III. AGGREGATE DSA ANALYSES

In this section, 17 of the 18 Study Areas (Canton Township SA excluded) are compared and analyzed as a collective group to establish trends, anomalies, and/or commonalities. These comparisons and analyses cover demographic data, supply information from field surveys, survey results, and demand factors. The findings in this section form the basis for most of the conclusions and recommendations in Section IV of this study.

The Canton Township Study Area was excluded from aggregate analyses on the basis that it lacks a traditional "downtown" area of size with older buildings, intertwined commercial and residential uses, and historic "central business district" context. The Canton Township SA (Cherry Hill Village), while an intriguing development phenomenon with its own historic elements, is a small-scale "new-build/new-towne" plan devoid of large city "downtown dynamics". The inclusion of data from the Canton Township SA could skew or mislead findings emanating from the aggregate analyses of similar study area participants.

In most tables of this section, values are highlighted in red and blue. This is done to assist the reader in quickly identifying the DSAs with the lowest and highest values during data comparisons. Also, this color-coding eliminates the need to repeat high and low DSA names and values in the text. Red colored numbers represent the highest values, while blue colored numbers represent the lowest values.

A. DEMOGRAPHIC COMPARISONS

In this section, Downtown Study Areas (DSAs) are compared to each other, to aggregate DSA averages and medians, and to statewide values on key demographic data. The information has been compiled from the U.S. Census Bureau, Claritas, Inc., the U.S. Department of Housing and Urban Development, the U.S. Department of Labor, and the FBI. It has been grouped into four categories for analysis: (1) population characteristics - descriptors of people, (2) household characteristics - descriptors of people living together in residences, (3) housing characteristics - descriptors of residential dwelling units, and (4) crime, transit and economic characteristics - descriptors of crime, transit/commuting, and business/employment activities.

All values in this demographic section are for the year 2007, unless otherwise noted. Since the date of this study falls between the 2000 and 2010 Censuses, we rely on estimated and projected data based on the 2000 U.S. Census from Claritas, Inc., a nationally recognized demographic supplier, for the years in between. Their methodologies can be reviewed in Addendum F of this volume.

1. POPULATION CHARACTERISTICS

The following two tables provide demographic descriptors of the people living within each DSA. In addition, DSA aggregate averages and medians, and statewide values are provided to allow comparisons between individual DSAs and DSA aggregate and statewide values.

DOWNTOWN STUDY AREA	POP. COUNT	SHARE OF CITY	PERCENT CHANGE 1990-1999	PERCENT CHANGE 2000-2012	MEDIAN AGE	DISTRIBUTION OF AGE			
						<18 YEARS	18-34 YEARS	35-54 YEARS	55+ YEARS
ANN ARBOR	1,733	1.5%	8.8%	-3.4%	26.9	**1.6%**	67.9%	19.0%	11.5%
BATTLE CREEK	**49**	**0.1%**	-14.3%	-13.4%	31.1	**32.7%**	24.5%	20.4%	22.4%
BAY CITY	1,103	3.2%	0.3%	-10.6%	36.2	18.6%	29.9%	23.3%	28.2%
EAST LANSING	1,215	2.7%	-6.1%	-8.2%	**22.1**	2.1%	**89.6%**	**5.1%**	**3.2%**
FERNDALE	2,084	**9.8%**	-11.6%	-6.1%	37.5	16.5%	28.6%	34.6%	20.3%
FLINT	1,160	1.0%	**-18.5%**	-9.3%	36.1	6.3%	40.8%	**39.8%**	13.1%
GRAND RAPIDS	**4,070**	2.1%	5.6%	-1.3%	37.2	14.1%	32.2%	30.7%	23.0%
HOLLAND	703	2.0%	7.0%	-7.8%	28.0	20.2%	39.8%	20.6%	19.3%
JACKSON	524	1.5%	-1.5%	0.3%	36.9	21.2%	25.6%	29.6%	23.7%
KALAMAZOO	1,072	1.5%	7.5%	-6.7%	34.2	9.7%	41.7%	27.1%	21.5%
LANSING	2,473	2.2%	-16.8%	-12.1%	31.9	21.1%	34.5%	27.2%	17.2%
MIDLAND	322	0.8%	**23.1%**	5.3%	36.7	19.6%	28.3%	26.1%	26.1%
MUSKEGON	569	1.4%	7.5%	**17.0%**	35.5	28.3%	21.3%	22.1%	28.3%
PONTIAC	1,165	1.8%	-4.9%	-7.2%	34.0	29.0%	22.7%	32.2%	16.1%
PORT HURON	1,306	4.2%	-4.2%	-11.0%	36.6	18.3%	29.3%	27.3%	25.1%
SAGINAW-NORTH	316	0.6%	-13.2%	**-17.1%**	**48.4**	10.4%	**16.8%**	35.4%	**37.3%**
SAGINAW-SOUTH	473	0.8%	9.9%	-1.4%	34.1	14.2%	37.8%	32.1%	15.9%
DSA AVERAGE	1,196	2.2%	-1.3%	-5.5%	34.3	16.7%	36.0%	26.6%	20.7%
DSA MEDIAN	1,103	1.5%	-1.5%	-7.2%	35.5	18.3%	29.9%	27.2%	21.5%
STATEWIDE	-	-	6.9%	3.3%	37.1	24.5%	22.6%	29.2%	23.7%

Source: 2000 Census; Claritas, Inc.
Blue Value Lowest
Red Value Highest
POP. = Population

DOWNTOWN STUDY AREA	PERCENT MALES	EDUCATION		MARITAL STATUS		LAND AREA IN SQUARE MILES	POPULATION DENSITY (PER SQUARE MILE)	DAYTIME POPULATION
		SOME OR GRADUATED HIGH SCHOOL	SOME OR GRADUATED COLLEGE	PERCENT SINGLE	PERCENT MARRIED			
ANN ARBOR	52.2%	17.0%	83.0%	90.1%	9.9%	0.3	6,796	11,845
BATTLE CREEK	**39.6%**	68.3%	31.7%	54.0%	46.0%	0.4	**121**	4,648
BAY CITY	51.5%	67.3%	32.7%	69.2%	30.8%	0.5	2,210	4,698
EAST LANSING	50.2%	**7.5%**	**92.5%**	**91.1%**	**8.9%**	**0.1**	**10,474**	1,920
FERNDALE	50.1%	35.6%	64.4%	64.7%	35.3%	0.3	6,202	1,521
FLINT	**74.4%**	64.7%	35.4%	**53.5%**	**46.5%**	0.6	2,017	12,511
GRAND RAPIDS	54.8%	50.6%	49.4%	75.4%	24.6%	**1.6**	2,491	**73,540**
HOLLAND	48.9%	52.5%	47.5%	61.5%	38.5%	0.3	2,450	1,751
JACKSON	51.5%	73.5%	26.5%	67.1%	32.9%	0.5	1,120	7,699
KALAMAZOO	49.9%	50.9%	49.1%	68.0%	32.0%	0.5	2,098	15,186
LANSING	52.8%	45.1%	54.9%	71.7%	28.4%	1.2	2,068	35,384
MIDLAND	47.3%	44.1%	55.9%	57.7%	42.4%	0.2	1,917	**1,469**
MUSKEGON	45.7%	67.7%	32.3%	66.7%	33.3%	0.6	902	3,657
PONTIAC	54.4%	**77.4%**	**22.6%**	68.2%	31.8%	0.4	2,600	4,833
PORT HURON	53.4%	68.1%	31.9%	62.8%	37.2%	0.6	2,127	5,963
SAGINAW-NORTH	53.0%	69.7%	30.3%	82.9%	17.1%	0.2	1,564	2,681
SAGINAW-SOUTH	66.1%	60.6%	39.4%	65.0%	35.0%	0.2	3,133	2,767
DSA AVERAGE	52.7%	54.2%	45.8%	68.8%	31.2%	0.5	2,958	11,298
DSA MEDIAN	51.5%	60.6%	39.4%	67.1%	32.9%	0.4	2,127	4,698
STATEWIDE	49.2%	47.6%	52.4%	43.7%	56.3%	56,804	179	-

Source: 2000 Census; Claritas, Inc.
Blue Value Lowest
Red Value Highest

Noteworthy observations and trends include the following:

- Of the 17 DSAs in this study, Grand Rapids has the largest estimated 2007 DSA population with 4,070, while Battle Creek has the smallest with 49. On a citywide basis, Grand Rapids has the largest 2007 estimated population with 192,441, while Ferndale has the smallest with 21,277.

- The average number of residents living within a Downtown Study Area (DSA) was 1,196. On average, a DSA contained 2.2% of its city's population.

- During 1990s, DSAs experienced an average decline of 1.3% in their populations. Half of the DSAs grew and half declined. From 2000 to 2012, DSA populations were projected to decline an additional 5.5%. Only three DSAs were expected to increase population during this time period: Jackson, Midland, and Muskegon.

- The average median age for DSA residents was 34.3 years. This was 7.6% lower than the state median age of 37.1 years.

- DSAs averaged 31.8% fewer children (below 18 years), 59.3% more young adults (18 to 34 years), 8.9% fewer middle-aged adults (35 to 54 years), and 12.7% fewer senior adults (55+ years) than the state as a whole.

- DSAs averaged 7.1% more males than the state as a whole (52.7% versus 49.2%). There were more males than females in 12 of the 17 DSAs.

- On average, more DSA residents stopped their education at high school than did the statewide average (54.2% versus 47.6%). Conversely, fewer DSA residents attended college than did the statewide average (45.8% versus 52.4%).

- The average DSA resident was much more likely to be single (68.8%) than married (31.2%). The average DSA single rate was 57.4% higher than the statewide average (68.8% versus 43.7%).

- The presence of large universities near the DSAs of Ann Arbor (University of Michigan) and East Lansing (Michigan State University) explains the very high percentage of young, single, college-educated adults in both.

- The average land area for a DSA in this study was 0.5 square miles.

- The average population density (number of residents living within a DSA divided by its land area) for all DSAs was 2,958 persons per square mile.

- The average daytime population (number of people working within a DSA) for all DSAs was 11,298 (4,698 median value). On average, nearly four times more people work in a DSA than live in a DSA (daytime population divided by DSA population density).

2. HOUSEHOLD CHARACTERISTICS

The following two tables provide demographic descriptors of people living together in households within each DSA. In addition, DSA aggregate averages and medians, and statewide values are provided to allow comparisons between individual DSAs and DSA aggregate and statewide values.

DOWNTOWN STUDY AREA	HOUSEHOLD COUNT	SHARE OF CITY	PERCENT CHANGE 1990-1999	PERCENT CHANGE 2000-2012	AVERAGE HOUSEHOLD SIZE	PERCENT WITHOUT CHILDREN	PERCENT STUDENT HOUSEHOLDS
ANN ARBOR	1,144	2.5%	18.7%	1.7%	1.6	**95.3%**	44.0%
BATTLE CREEK	**16**	**0.1%**	-32.1%	-22.1%	1.9	76.3%	**0.0%**
BAY CITY	592	4.0%	-3.7%	-11.0%	1.8	77.4%	6.9%
EAST LANSING	379	2.6%	9.4%	-7.8%	**2.9**	94.4%	**80.3%**
FERNDALE	1,131	**11.6%**	0.8%	-1.3%	2.0	75.4%	3.0%
FLINT	261	0.6%	**-34.0%**	-29.1%	1.6	84.0%	33.6%
GRAND RAPIDS	**2,259**	3.1%	17.9%	1.6%	1.6	86.5%	8.0%
HOLLAND	261	2.2%	21.4%	-11.5%	2.6	67.6%	1.8%
JACKSON	266	2.0%	-10.3%	-1.9%	2.0	73.6%	18.5%
KALAMAZOO	435	1.5%	5.4%	1.9%	1.7	91.2%	25.2%
LANSING	1,472	3.1%	-13.9%	-11.1%	1.9	77.0%	32.9%
MIDLAND	191	1.1%	**43.8%**	11.4%	1.9	75.1%	1.0%
MUSKEGON	300	2.1%	7.9%	**15.9%**	1.9	73.5%	11.1%
PONTIAC	481	2.0%	-10.4%	-1.6%	2.4	66.1%	15.2%
PORT HURON	544	4.3%	-10.6%	-12.4%	2.0	73.3%	10.2%
SAGINAW-NORTH	195	0.9%	-22.6%	**-24.5%**	**1.4**	85.8%	19.7%
SAGINAW-SOUTH	66	0.3%	-16.5%	-20.8%	2.7	**54.6%**	**0.0%**
DSA AVERAGE	588	2.6%	-1.7%	-7.2%	2.0	78.1%	20.1%
DSA MEDIAN	379	2.1%	-3.7%	-7.8%	1.9	76.3%	11.1%
STATEWIDE	-	-	5.9%	10.7%	2.5	60.5%	-

Source: 2000 Census; Claritas, Inc.
Blue Value Lowest
Red Value Highest

DOWNTOWN STUDY AREA	PRIZM LIFESTAGE CLASSES*			OWNERS VERSUS RENTERS		MEDIAN GROSS INCOME	MEDIAN DISPOSABLE INCOME
	PERCENT *YOUNGER YEARS*	PERCENT *FAMILY LIFE*	PERCENT *MATURE YEARS*	PERCENT OWNERS	PERCENT RENTERS		
ANN ARBOR	87.9%	**0.2%**	11.9%	17.5%	82.5%	$13,817	$13,533
BATTLE CREEK	39.2%	17.1%	43.7%	25.0%	75.0%	$21,520	$21,748
BAY CITY	22.9%	10.3%	66.8%	22.6%	77.4%	$13,170	$13,061
EAST LANSING	**98.2%**	0.5%	**1.3%**	8.7%	91.3%	$17,318	$16,175
FERNDALE	28.4%	46.9%	24.7%	57.8%	42.2%	**$50,046**	**$40,997**
FLINT	55.5%	4.9%	39.6%	10.7%	89.3%	$21,909	$20,276
GRAND RAPIDS	**21.1%**	**57.9%**	21.0%	14.3%	85.7%	$19,991	$18,906
HOLLAND	31.2%	21.2%	47.6%	**57.9%**	**42.1%**	$45,307	$37,245
JACKSON	27.8%	21.8%	50.4%	21.8%	78.2%	$13,337	$13,288
KALAMAZOO	60.1%	2.6%	37.3%	10.1%	89.9%	$28,145	$25,151
LANSING	63.0%	11.1%	25.9%	14.0%	86.0%	$22,171	$20,643
MIDLAND	33.6%	15.3%	51.1%	28.3%	71.7%	$23,922	$22,540
MUSKEGON	37.8%	9.8%	52.4%	25.0%	75.0%	$20,374	$18,871
PONTIAC	29.2%	23.9%	46.9%	18.9%	81.1%	$17,131	$15,850
PORT HURON	33.5%	15.6%	50.9%	27.4%	72.6%	$23,767	$21,781
SAGINAW-NORTH	25.2%	2.8%	**72.0%**	**5.6%**	**94.4%**	**$8,134**	**$10,155**
SAGINAW-SOUTH	46.9%	28.5%	24.6%	51.5%	48.5%	$33,503	$29,591
DSA AVERAGE	43.6%	17.1%	39.3%	24.5%	75.5%	$23,151	$21,165
DSA MEDIAN	33.5%	15.3%	43.7%	21.8%	78.2%	$21,520	$20,276
STATEWIDE	32.7%	30.6%	36.7%	74.5%	25.5%	$50,319	$41,752

Source: 2000 Census; Claritas, Inc.
Blue Value Lowest
Red Value Highest
*See Addendum A for Prizm Lifestage Class definitions

Noteworthy observations and trends include the following:

- The average number of households residing within a Downtown Study Area was 588, 379 was the median value. On average, a DSA contained 2.6% of its city's households.

- During the 1990s, DSAs experienced an average decline of 1.7% in their households. From 2000 to 2012, DSA households were projected to decline an additional 7.2%. Only five DSAs were expected to increase households during this time period: Ann Arbor, Grand Rapids, Kalamazoo, Midland, and Muskegon.

- From 1990 to 2012, the average number of DSA households will decrease at a faster rate than their populations (8.9% decrease versus 6.8%). This represents a consolidation of households (fewer households with more members).

- The average household size for DSAs was two members. This was 20.0% smaller than the state average (two versus 2.5).

- The average DSA household was much more likely to not have children (78.1%) than have them (21.9%). On average, there were 29.1% more households without children in DSAs than the state as a whole (78.1% versus 60.5%). In DSAs, more than three out of four households were childless.

- The top five DSAs with the highest share of student households are: East Lansing (80.3%-Michigan State University), Ann Arbor (44.0%-University of Michigan), Flint (33.6%-University of Michigan at Flint), Lansing (32.9%-Cooley Law School), and Kalamazoo (25.2%-University of Western Michigan). These institutes of higher education are clearly impacting and driving the demographics and housing of their respective downtowns.

- *Prizm NE Lifestage Classes* indicate that DSAs averaged 33.3% more *Younger Years* households, 44.1% fewer *Family Life* households, and 7.1% more *Mature Years* households than the state as a whole. (See Addendum A for Lifestage Class definitions.)

- The average percentages for owner and renter households in DSAs (24.5% owner and 75.5% renter) were opposite from the statewide averages (74.5% owner and 25.5% renter). Three out of four DSA residents rented rather than owned.

- The average median gross income for DSA residents was $23,151. This value was 54.0% less than the statewide average of $50,319.

- The average median effective buying income for DSA residents was $21,165. This value was 49.3% less than the statewide average of $41,752.

3. HOUSING CHARACTERISTICS

The following two tables provide demographic descriptors of household dwelling units within each DSA. In addition, DSA aggregate averages and medians, and statewide values are provided to allow comparisons between individual DSAs and DSA aggregate and statewide values.

DOWNTOWN STUDY AREA	HOUSING UNIT COUNT	SHARE OF CITY	PERCENT VACANT*	PERCENT OF HOUSING UNITS BY STRUCTURE TYPE** 2000		PERCENT WITH HOUSING COST > 30% OF INCOME 2000		GROSS MONTHLY HOUSING PAYMENT 2000	
				MULTI	SINGLE	OWNER	RENTER	OWNER	RENTER
ANN ARBOR	1,248	2.6%	8.3%	91.2%	8.8%	10.8%	66.7%	$967	$767
BATTLE CREEK	**55**	**0.2%**	**70.9%**	91.1%	8.9%	25.0%	40.2%	$570	$326
BAY CITY	651	4.1%	9.1%	77.8%	21.2%	26.1%	36.1%	$705	$279
EAST LANSING	398	2.6%	**4.8%**	60.1%	39.7%	7.9%	**76.3%**	$1,106	**$870**
FERNDALE	1,201	**11.7%**	5.8%	33.4%	**66.4%**	19.9%	29.0%	$1,131	$583
FLINT	458	0.8%	43.0%	**31.4%**	50.0%	**0.0%*****	44.2%	$593	$416
GRAND RAPIDS	**2,658**	3.4%	15.0%	**91.8%**	**8.2%**	26.8%	40.2%	**$1,359**	$435
HOLLAND	290	2.3%	10.0%	49.0%	51.0%	12.1%	42.7%	$925	$692
JACKSON	305	2.1%	12.8%	77.9%	21.4%	32.5%	35.4%	$555	$323
KALAMAZOO	501	1.6%	13.2%	89.1%	10.1%	16.7%	38.4%	$1,165	$451
LANSING	1,785	3.4%	17.5%	78.1%	21.9%	22.3%	39.4%	$557	$446
MIDLAND	206	1.1%	7.3%	62.6%	37.4%	8.2%	57.7%	$610	$546
MUSKEGON	362	2.3%	17.1%	68.4%	31.6%	7.0%	64.0%	$562	$439
PONTIAC	543	2.0%	11.4%	68.2%	31.8%	**49.3%**	46.8%	$506	$405
PORT HURON	620	4.5%	12.3%	61.5%	38.5%	23.4%	41.2%	$750	$443
SAGINAW-NORTH	230	0.9%	15.2%	82.7%	17.3%	**0.0%*****	**13.3%**	**$242**	**$250**
SAGINAW-SOUTH	87	0.4%	24.1%	48.9%	51.1%	12.9%	45.5%	$361	$435
DSA AVERAGE	682	2.7%	17.5%	68.4%	30.3%	17.7%	44.5%	$745	$477
DSA MEDIAN	458	2.3%	12.8%	68.4%	31.6%	16.7%	41.2%	$610	$439
STATEWIDE	-	-	12.2%	25.5%	74.5%	17.8%	37.6%	$1,037	$578

Source: 2000 Census; Claritas, Inc.
Blue Value Lowest
Red Value Highest
*Vacant = Unoccupied for various reasons; not just for sale or for rent
**Structure Type: Multi = Multi-Unit Building (2+ units) / Single = Single-Family Home
***Zero values indicate one or more of the following three conditions: (1) very few owner-occupied units, (2) a large concentration of owner households with high incomes, or (3) a large concentration of owner households with low or no monthly housing payments.

DOWNTOWN STUDY AREA	OWNER AVERAGE RESIDENCY IN YEARS	PERCENT ANNUAL TURNOVER		MULTI-UNIT PERMITS CITYWIDE 2000-2006*	UNIT DESCRIPTION 2000		2007 MEDIAN HOME VALUE
		OWNER	RENTER		AVERAGE NUMBER OF ROOMS	AVERAGE NUMBER OF BEDROOMS	
ANN ARBOR	**3**	19.9%	50.3%	471	2.8	1.1	$135,882
BATTLE CREEK	8	0.0%	34.3%	401	**2.7**	1.9	$80,000
BAY CITY	8	14.1%	**20.1%**	**0**	4.1	2.0	$99,000
EAST LANSING	**3**	4.6%	**65.7%**	**0**	4.8	**2.3**	$155,357
FERNDALE	**10**	9.4%	32.5%	35	**5.3**	2.1	$158,824
FLINT	4	**43.6%**	39.7%	108	3.9	0.8	$83,333
GRAND RAPIDS	5	7.7%	39.0%	**938**	3.4	1.7	**$190,948**
HOLLAND	9	9.0%	36.6%	34	5.1	2.1	$129,902
JACKSON	7	10.5%	31.4%	6	4.0	1.9	$78,000
KALAMAZOO	**3**	31.6%	46.1%	227	4.0	1.9	$163,636
LANSING	6	4.6%	33.9%	883	4.1	2.0	$78,222
MIDLAND	7	**3.3%**	28.8%	110	4.4	2.0	$85,714
MUSKEGON	8	3.5%	33.6%	293	4.6	2.1	$79,000
PONTIAC	6	15.7%	28.0%	5	4.0	2.1	$71,071
PORT HURON	7	5.1%	27.0%	120	4.6	2.1	$105,303
SAGINAW-NORTH	9	43.1%	22.5%	**0**	4.0	**0.5**	**$34,000**
SAGINAW-SOUTH	8	18.5%	56.2%	**0**	5.1	2.1	$50,769
DSA AVERAGE	7	14.4%	36.8%	214	4.2	1.8	$120,453
DSA MEDIAN	7	9.4%	33.9%	108	4.1	2.0	$85,714
STATEWIDE	11	7.7%	31.6%	-	5.7	2.3	$145,613

Source: 2000 Census; Claritas, Inc.
*Source: HUD; State of the Cities Data System
Blue Value Lowest
Red Value Highest

Noteworthy observations and trends include the following:

- The average number of total housing units within a Downtown Study Area was 682. On average, a DSA contained 2.7% of its city's housing units.

- The average vacancy rate for all DSA housing units was 17.5%, with a 12.8% median value. This was 43.3% higher than the statewide average (17.5% versus 12.2%). It is important to note that these vacancy rates include **all unoccupied units** (vacant at the time the Census was taken). Unoccupied (vacant) units could be: (1) seasonally used, (2) uninhabitable by building code, (3) foreclosed upon, (4) for sale, or (5) for rent. Of the total vacant housing units within DSAs in 2000, 37.0% were for rent, 8.2% were for sale, and 54.8% were vacant for reasons other than being on the market. With respect to total housing units within DSAs in 2000, 7.6% were for rent, 1.3% were for sale, and 8.8% were vacant due to reasons other than being on the market.

- On average, 68.4% of DSA housing units were in multi-unit buildings (two units or more per building). This was 2.7 times higher than the statewide average (68.4% versus 25.5%). Only 30.3% of DSA housing units were single-family or single-unit structures.

- The average percentage of DSA households paying more than 30% of their gross income for housing payments was 17.7% for owners and 44.5% for renters. The percentage for owners is the same as the statewide average, while the percentage for renters is 18.4% higher than the statewide average.

- The average gross monthly housing payment for owner-occupied housing units in DSAs was $745. This was 28.2% lower than the statewide average. The average gross monthly housing payment for renter-occupied housing units in DSAs was $477. This was 17.5% lower than the statewide average.

- On average, DSA housing unit owners stayed in their homes for a shorter period of time before moving than the statewide average (seven years versus 11 years).

- Average annual turnover rates for owner- and renter-occupied housing units in DSAs were higher than statewide averages. On average, 14.4% of DSA owners and 36.8% of DSA renters moved each year. Statewide averages were 7.7% for owners and 31.6% for renters.

- From 2000 to 2006, the average number of building permits issued for units in multi-unit residential buildings in DSA cities was 214, or 31 per year. Six out of the 16 DSAs had less than 10 permits issued during this seven-year period.

- The average DSA housing unit had 4.2 rooms and 1.8 bedrooms. These values were 26.3% and 55.6% smaller, respectively than the comparable statewide averages (5.7 and 2.3).

- According to Claritas, Inc., which is an update of the 2000 Census, the 2007 estimated average median home value for DSA owner-occupied housing units was $120,453 ($85,714 median value). This value was 17.3% less than the statewide average of $145,613, the median value was 41.1% less.

4. CRIME, TRANSIT AND ECONOMIC CHARACTERSITICS

The following two tables provide demographic descriptors of crime, transit/commuting, and business/employment activities within each DSA. In addition, DSA aggregate averages and medians, and statewide values are provided to allow comparisons between individual DSAs and DSA aggregate and statewide values.

DOWNTOWN STUDY AREA	AVERAGE COMMUTE TIME IN MINUTES	PERCENT WALK OR BUS TO WORK	PERCENT WORK AT HOME	VEHICLES PER HOUSEHOLD	CRIME RISK INDICES*	
					PERSONAL CRIME	PROPERTY CRIME
ANN ARBOR	17.2	**59.4%**	3.9%	0.9	108	172
BATTLE CREEK	26.5	18.2%	**0.0%**	**0.6**	192	345
BAY CITY	16.5	8.5%	2.0%	0.7	168	266
EAST LANSING	15.6	29.3%	2.8%	**2.4**	**25**	**20**
FERNDALE	24.3	**3.0%**	2.8%	1.2	99	79
FLINT	**30.4**	18.3%	2.9%	0.7	**454**	**835**
GRAND RAPIDS	21.2	28.3%	3.7%	0.7	161	282
HOLLAND	**15.1**	19.7%	1.8%	1.4	40	67
JACKSON	21.2	9.5%	0.7%	0.7	246	243
KALAMAZOO	18.5	24.0%	6.0%	1.2	139	324
LANSING	20.8	16.5%	3.9%	0.8	203	324
MIDLAND	17.2	10.2%	**0.0%**	0.9	40	47
MUSKEGON	18.2	14.3%	6.0%	**0.6**	239	363
PONTIAC	24.0	7.4%	2.9%	0.7	234	478
PORT HURON	18.6	16.1%	0.2%	0.8	78	73
SAGINAW-NORTH	18.7	6.3%	**0.0%**	**0.6**	317	641
SAGINAW-SOUTH	20.7	17.8%	**14.7%**	1.1	336	680
DSA AVERAGE	20.3	18.1%	3.2%	0.9	181	308
DSA MEDIAN	18.7	16.5%	2.8%	0.8	168	282
STATEWIDE	26.2	3.4%	2.9%	1.8	94	115

Source: 2000 Census; Claritas, Inc.
*Source: Applied Geographic Solutions (modeled from FBI Uniform Crime Report); 100 value = average national risk
Blue Value Lowest
Red Value Highest

DOWNTOWN STUDY AREA	2007 CITYWIDE JOBLESS RATE*	WORKERS LIVING IN DSA	JOBS IN DSA	JOBS PER WORKER LIVING IN DSA	SIZE OF LARGEST EMPLOYER WITHIN ONE MILE OF DSA**	RETAIL BUSINESS DENSITY PER SQUARE MILE	RETAIL BUSINESSES IN DSA	RETAIL BUSINESSES PER DSA RESIDENT
ANN ARBOR	5.2%	935	11,844	12.7	**38,000**	**996**	254	0.15
BATTLE CREEK	8.2%	**11**	4,648	**422.5**	3,000	96	39	**0.80**
BAY CITY	7.5%	345	4,696	13.6	1,312	202	101	0.09
EAST LANSING	7.2%	566	1,920	3.4	8,950	397	46	0.04
FERNDALE	6.1%	1,291	1,521	**1.2**	400	155	52	**0.03**
FLINT	15.1%	241	12,511	51.9	2,600	78	45	0.04
GRAND RAPIDS	8.3%	**1,802**	**73,539**	40.8	15,000	163	**267**	0.07
HOLLAND	7.4%	334	1,752	5.3	800	84	24	**0.03**
JACKSON	11.2%	148	7,699	52.0	3,000	133	62	0.12
KALAMAZOO	7.5%	484	15,186	31.4	4,000	225	115	0.11
LANSING	8.6%	1,084	35,383	32.6	6,000	109	130	0.05
MIDLAND	**4.4%**	119	**1,469**	12.3	400	155	26	0.08
MUSKEGON	9.5%	168	3,656	21.8	**350**	**52**	33	0.06
PONTIAC	**16.1%**	310	4,833	15.6	1,800	80	36	**0.03**
PORT HURON	12.5%	453	5,964	13.2	1,300	116	71	0.05
SAGINAW-NORTH	12.7%	63	2,680	42.5	4,500	55	**11**	0.04
SAGINAW-SOUTH	12.7%	116	2,768	23.9	4,500	126	19	0.04
DSA AVERAGE	9.2%	498	11,298	46.9	5,642	190	78	0.11
DSA MEDIAN	8.3%	334	4,696	21.8	3,000	126	46	0.05
STATEWIDE	7.2%	-	-	-	-	1.57	-	0.01

Source: 2000 Census; Claritas, Inc.
*Source: DOL; Bureau of Labor Statistics
**Source: Info USA Business Database; Claritas, Inc.
Blue Value Lowest
Red Value Highest
DSA = Downtown Study Area

Noteworthy observations and trends include the following:

- On average, DSA working residents had a 22.5% shorter commute time than the statewide average (20.3 minutes versus 26.2 minutes). DSA working residents either walked or rode public transit to work five times more often than statewide workers (18.1% versus 3.4%).

- The average number of DSA residents that worked at home was similar to the statewide average (3.2% versus 2.9%). Living within DSAs did not increase the number of residents that worked at home.

- On average, DSA households had half as many vehicles as the statewide average (0.9 versus 1.8). The average DSA household had only one vehicle. This is a function of the smaller household size.

- Average crime indices for DSAs were much higher than statewide averages. Personal crimes occurred nearly two times more often than statewide frequencies. Property crimes occurred nearly three times more often than statewide frequencies. Five DSAs had crime indices equal to or below the statewide averages: East Lansing, Ferndale, Holland, Midland, and Port Huron.

- The average unemployment rate for DSAs was higher than the statewide average (9.2% versus 7.2%). Four DSAs were equal to or below the statewide average: Ann Arbor, East Lansing, Ferndale, and Midland.

- The average number of working residents within DSAs was 498. The average number of jobs within DSAs was 11,298 (4,696 median value). The average number of jobs per DSA working resident was 46.9 (21.8 median value).

- The average size of the largest employer within 1.0 mile of DSAs was 5,642 (3,000 median value).

- The average number of retail businesses within DSAs was 78 (46 median value). The average number of retail businesses per square mile for DSAs was 190. And finally, the average number of retail businesses within a DSA per DSA resident was 0.11 (0.05 median value). The average number of retail businesses per Michigan resident was much lower at 0.01.

B. MULTI-UNIT HOUSING SUPPLY COMPARISONS

In this section, Downtown Study Areas (DSAs) are compared to each other and to aggregate DSA totals and averages on key housing supply information extracted from our field survey. The field survey was completed in July 2007, the cut-off date for all property information included within this study. Any property that was planned (filed with a city), but not yet placed in construction, was excluded from the field survey. Planned properties are discussed in Section IV of this study. Properties under construction were surveyed, but their data is used on a selective basis. Typically, rental properties/units under construction are excluded from analyses (unavailable for rent), while condominium properties/units under construction are included (available for sale).

Multi-unit rental housing is presented first, followed by multi-unit condominium housing, and then both types are combined together.

1. MULTI-UNIT RENTAL HOUSING

The following information is extracted from the field survey of 44 multi-unit rental properties with 1,638 units in 12 DSAs. Five DSAs did not have any multi-unit rental properties. It should be noted that surveyed rental properties that were fully under construction at the time of the fieldwork (July 2007) are excluded from this section. Surveyed properties that were partially under construction are included, but their "units under construction" are not. Seven rental properties were fully under construction with 214 units, and one property had five of its 25 total units under construction (this property and its 20 existing units are included). Thus, only "available" or "leaseable" units are analyzed in this section.

The following table provides property and unit information for all surveyed multi-unit rental housing by DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values. Properties and units are divided into three rental types (market-rate, Tax Credit, and market-rate/Tax Credit).

DOWNTOWN STUDY AREA	PROPERTIES BY TYPE*				UNITS BY PROPERTY TYPE AND OVERALL VACANCY				
	MRR	TAX	MRT	TOTAL	MRR	TAX	TOTAL	VACANT	PERCENT VACANT**
ANN ARBOR	1	2	0	3	64	122	186	6	3.2%
BATTLE CREEK	1	0	0	1	13	0	13	5	38.5%
BAY CITY	1	0	0	1	11	0	11	0	0.0%
EAST LANSING	2	0	0	2	53	0	53	0	0.0%
FERNDALE	1	0	0	1	22	0	22	2	9.1%
FLINT	4	2	0	6	119	69	188	16	8.5%
GRAND RAPIDS	3	2	1	6	204	169	373	57	15.3%
HOLLAND	-	-	-	-	-	-	-	-	-
JACKSON	-	-	-	-	-	-	-	-	-
KALAMAZOO	9	0	0	9	156	0	156	2	1.3%
LANSING	7	0	0	7	327	0	327	8	2.5%
MIDLAND	-	-	-	-	-	-	-	-	-
MUSKEGON	0	2	1	3	21	232	253	43	17.0%
PONTIAC	4	0	0	4	52	0	52	6	11.5%
PORT HURON	1	0	0	1	4	0	4	1	25.0%
SAGINAW-NORTH	-	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-	-
DSA TOTALS	34	8	2	44	1,046	592	1,638	146	-
AVERAGES FOR ALL 17 DSAs	2.0	0.5	0.1	2.6	61.5	34.8	96.4	8.6	8.9%
AVERAGES FOR 12 DSAs w/ UNITS	2.8	0.7	0.2	3.7	87.2	49.3	136.5	12.2	8.9%

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)
*Property Types: MRR = Market-rate / TAX = Tax Credit (non-subsidized) / MRT = Market-rate/Tax Credit
**Vacant = "Available for lease, but not rented"

Noteworthy observations and trends include the following:

- There are a total of 44 surveyed multi-unit rental properties that met the study's selection criteria within the 17 Downtown Study Areas. This represents an average of 2.6 properties per DSA or 3.7 properties per DSA with rental units. The Kalamazoo DSA has the highest number of surveyed rental properties of any DSA. Of these 44 properties, 77.3% are market-rate, 18.2% are Tax Credit, and 4.5% have both market-rate and Tax Credit units. DSAs in Saginaw, Midland, Jackson, and Holland have no multi-unit rental properties that met the study's criteria. There are nearly four times more market-rate properties than Tax Credit properties within the DSAs.

- There are a total of 1,638 surveyed rental units that met the study's selection criteria within the 17 DSAs. On average, this represents 96.4 rental units per DSA or 136.5 rental units per DSA with multi-unit rental properties. The Grand Rapid's DSA has the highest number of surveyed rental units of any DSA. Of these 1,638 rental units, 63.9% are market-rate and 36.1% are Tax Credit. Market-rate properties average 29.9 units in size, while Tax Credit properties average 65.8. While on average Tax Credit properties are twice as large as market-rate properties, there are much fewer of them.

- There is an average of 37.2 units per surveyed rental property in the DSAs, with an average vacancy rate of 8.9%.

The following table distributes all surveyed rental units by property type and unit size (number of bedrooms) for each DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values. Three- and four-bedroom unit types are combined into one category, since there are few four-bedroom units.

DOWNTOWN STUDY AREA	MARKET-RATE UNITS BY BEDROOMS				TAX CREDIT UNITS BY BEDROOMS			
	STUDIO	ONE-BR.	TWO-BR.	THREE-BR.+	STUDIO	ONE-BR.	TWO-BR.	THREE-BR.+
ANN ARBOR	0	0	40	24	6	94	22	0
BATTLE CREEK	0	7	6	0	0	0	0	0
BAY CITY	2	4	5	0	0	0	0	0
EAST LANSING	16	15	22	0	0	0	0	0
FERNDALE	0	22	0	0	0	0	0	0
FLINT	3	81	35	0	0	12	42	15
GRAND RAPIDS	7	91	72	34	0	53	98	18
HOLLAND	-	-	-	-	-	-	-	-
JACKSON	-	-	-	-	-	-	-	-
KALAMAZOO	5	19	112	20	0	0	0	0
LANSING	55	196	71	5	0	0	0	0
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	2	5	7	7	0	125	95	12
PONTIAC	12	25	15	0	0	0	0	0
PORT HURON	0	2	1	1	0	0	0	0
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
DSA TOTALS	102	467	386	91	6	284	257	45
AVERAGES FOR ALL 17 DSAs	6.0	27.5	22.7	5.4	0.4	16.7	15.1	2.7
AVERAGES FOR 12 DSAs w/ UNITS	8.5	38.9	32.2	7.6	0.5	23.7	21.4	3.8

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)

Noteworthy observations and trends include the following:

- Of all the multi-unit rental properties within DSAs, a one-bedroom unit is the most common type at 45.8% (most common for both market-rate and Tax Credit properties). A two-bedroom unit is the next most common type at 39.3% (second most common for both market-rate and Tax Credit properties). Studio and three-bedroom units are next at 6.6% and 6.4%, respectively. The least common type is a four-bedroom unit at only 1.9% of all units. All 31 of the four-bedroom units are market-rate and located in the Grand Rapids DSA.

- Nine of the 17 DSAs (52.9%) have studio rental units. Only seven of the 17 DSAs (41.2%) have rental units with three or more bedrooms. Of the 12 DSAs with multi-unit rental properties, 50.0% have studio units and 58.3% have units with three or more bedrooms.

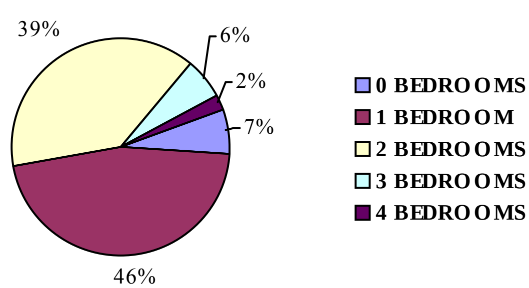
The following table and pie chart provide additional rental unit information on a market-rate and Tax Credit (property type) basis rather than by DSA.

DISTRIBUTION OF UNITS - STATEWIDE, MICHIGAN

MARKET-RATE						
BEDROOMS	**BATHS**	**UNITS**	**DISTRIBUTION**	**VACANT**	**%VACANT**	**MEDIAN ADJ. RENT***
0	1	102	9.8%	7	6.9%	$671
1	1	446	42.6%	29	6.5%	$782
1	1.5	15	1.4%	3	20.0%	$1,100
1	2	6	0.6%	0	0.0%	$1,026
2	1	178	17.0%	15	8.4%	$1,200
2	1.5	27	2.6%	1	3.7%	$1,226
2	2	181	17.3%	4	2.2%	$1,173
3	1	38	3.6%	2	5.3%	$2,100
3	1.5	6	0.6%	0	0.0%	$964
3	2	16	1.5%	0	0.0%	$1,414
4	1	31	3.0%	27	87.1%	$1,651
TOTAL		**1,046**	**100.0%**	**88**	**8.4%**	
139 UNITS UNDER CONSTRUCTION						
TAX CREDIT, NON-SUBSIDIZED						
BEDROOMS	**BATHS**	**UNITS**	**DISTRIBUTION**	**VACANT**	**%VACANT**	**MEDIAN ADJ. RENT***
0	1	6	1.0%	0	0.0%	$263
1	1	284	48.0%	14	4.9%	$570
2	1	166	28.0%	38	22.9%	$535
2	1.5	24	4.1%	0	0.0%	$431
2	2	67	11.3%	4	6.0%	$675
3	1	6	1.0%	2	33.3%	$505
3	2	24	4.1%	0	0.0%	$585
3	2.5	15	2.5%	0	0.0%	$494
TOTAL		**592**	**100.0%**	**58**	**9.8%**	
80 UNITS UNDER CONSTRUCTION						
GRAND TOTAL		**1,638**	**-**	**146**	**8.9%**	

DISTRIBUTION OF UNITS BY BEDROOM

NON-SUBSIDIZED



Surveyed - July 2007

Noteworthy observations and trends include the following:

- The average median net rents (weighted by unit count) by unit size for all surveyed market-rate rental properties in DSAs are as follows:

Studio:	$671
One-bedroom:	$795
Two-bedroom:	$1,189
Three-bedroom:	$1,803
Four-bedroom:	$1,651

  The average median net rents (weighted by unit count) by unit size for all surveyed Tax Credit rental properties in DSAs are as follows:

Studio:	$263
One-bedroom:	$570
Two-bedroom:	$562
Three-bedroom:	$544
Four-bedroom:	No units

  Average median net rents for market-rate rental units are more than twice as high as Tax Credit rental units, except for one-bedroom units where they are 1.4 times higher.

- The average vacancy rate for market-rate rental properties is 16.7% lower than Tax Credit rental properties (8.4% versus 9.8%).

The following table provides aggregate information on surveyed rental properties by DSA that is best presented in ranges rather than single values. This information includes unit sizes, monthly net rents, prices per square foot, property quality ratings, and building improvement dates.

DOWNTOWN STUDY AREA	UNIT SIZE RANGE*	MONTHLY NET RENT RANGE**	RENT PER SQUARE FOOT RANGE	QUALITY RATING RANGE***	YEAR BUILT RANGE	YEAR RENOVATED RANGE
ANN ARBOR	425-1,024	$205-$2,550	$0.48-**$2.76**	B- to B	1910-2003	1992-1994
BATTLE CREEK	1,140-1,600	$1,198-$1,599	$1.00-$1.05	A	1931	**2007**
BAY CITY	350-900	$290-$500	$0.56-$0.83	B-	1867	1990
EAST LANSING	400-1,400	$339-$1,428	$0.85-$1.36	B- to A	1948-2006	-
FERNDALE	525	$625-$645	$1.19-$1.23	B-	1964	-
FLINT	375-1,400	$154-$1,030	$0.20-$0.97	**C+** to A	**1864**-2005	1990-2005
GRAND RAPIDS	458-1,700	**$94**-$2,131	**$0.14**-$2.06	B to **A+**	1910-**2007**	1996-2004
HOLLAND	-	-	-	-	-	-
JACKSON	-	-	-	-	-	-
KALAMAZOO	**300**-**3,000**	$375-**$3,500**	$0.55-$1.65	**C+** to A	1900-2006	**1970**-**2007**
LANSING	580-2,850	$671-$2,850	$0.65-$1.32	B- to A	1902-2006	2001-**2007**
MIDLAND	-	-	-	-	-	-
MUSKEGON	370-1,489	$270-$860	$0.27-$1.00	B+ to A-	1889-1998	2001-2006
PONTIAC	425-1,000	$480-$1,921	$0.62-$1.97	**C+** to B+	1918-1964	1976-2005
PORT HURON	900-2,200	$1,026-$1,450	$0.66-$1.14	B+	1925	2003
SAGINAW-NORTH	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-
OVERALL RANGES	300-3,000	$94-$3,500	$0.14-$2.76	C+ to A+	1864-2007	1970-2007

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)
*Unit Size in square feet
**Net Rent excludes all utilities except water, sewer, and trash removal
***Quality Ratings range from E (lowest) to A+ (highest)

Noteworthy observations and trends include the following:

- For all multi-unit rental properties within DSAs, unit sizes range from 300 square feet to 3,000 square feet.

- For all multi-unit rental properties within DSAs, monthly net rents range from $94 to $3,500. The $94 net rent value in Grand Rapids is for a one-bedroom/one-bath Tax Credit unit in The Globe Apartments targeted at 45% AMHI.

- For all multi-unit rental properties within DSAs, rents per square foot range from $0.14 to $2.76.

- For all multi-unit rental properties within DSAs, quality ratings range from C+ to A+. No multi-unit rental property received a quality rating below a C+.

- For all multi-unit rental properties within DSAs, year built dates range from 1864 to 2007, while renovation dates range from 1970 to 2007.

The following table separates surveyed rental properties into three distinct building types (new construction, old buildings with major renovations, and old buildings with minor renovations) by DSA. The height of buildings in floors is also provided in a range from low to high by DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values.

DOWNTOWN STUDY AREA	PROPERTIES BY BUILDING TYPE*						BUIILDING FLOORS RANGE
	NEW CONSTRUCTION		OLD BUILDING MAJOR RENOVATION		OLD BUILDING MINOR RENOVATION		
	NUMBER	PERCENT	NUMBER	PERCENT	NUMBER	PERCENT	
ANN ARBOR	1	33.3%	2	66.7%	0	0.0%	2.5-11
BATTLE CREEK	0	0.0%	1	100.0%	0	0.0%	20
BAY CITY	0	0.0%	1	100.0%	0	0.0%	3
EAST LANSING	1	50.0%	0	0.0%	1	50.0%	3-5
FERNDALE	0	0.0%	0	0.0%	1	100.0%	2.5
FLINT	2	33.3%	2	33.3%	2	33.3%	2-6
GRAND RAPIDS	2	33.3%	4	66.7%	0	0.0%	3-32
HOLLAND	-	-	-	-	-	-	-
JACKSON	-	-	-	-	-	-	-
KALAMAZOO	3	33.3%	6	66.7%	0	0.0%	2-21
LANSING	1	14.3%	5	71.4%	1	14.3%	2-9
MIDLAND	-	-	-	-	-	-	-
MUSKEGON	1	33.3%	2	66.7%	0	0.0%	2-5
PONTIAC	0	0.0%	3	75.0%	1	25.0%	2-8
PORT HURON	0	0.0%	1	100.0%	0	0.0%	3
SAGINAW-NORTH	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-
DSA TOTALS OR OVERALL RANGES	11	-	27	-	6	-	2-32
AVERAGES FOR ALL 17 DSAs	0.7	25.0%	1.6	61.4%	0.3	13.6%	-
AVERAGES FOR 12 DSAs w/ UNITS	0.9	25.0%	2.2	61.4%	0.5	13.6%	-

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)
*Building Types: New Construction = site cleared and new building constructed from ground up
Major Renovation = old building gutted and reconfigured into new housing units
Minor Renovation = old building has original interior configuration, but has been updated overtime

Noteworthy observations and trends include the following:

- Of the 44 multi-unit rental properties in the 17 DSAs, 25.0% were newly constructed, 61.4% were major renovations of older buildings, and 13.6% were minor renovations (upgrades) of older buildings. Properties in older renovated buildings outnumber newly constructed properties three to one.

- Multi-unit rental property buildings in DSAs range in height from two to 32 floors. This represents a variance factor of 16.0.

The following table provides appliance and amenity information on all surveyed rental properties and units (44 properties and 1,638 units). For each appliance and amenity, the number and percentage of affected properties and units are shown. Appliances and amenities with high percentages (greater than 75%) are commonly offered, whereas appliances and amenities with low percentages (less than 25%) are rarely offered.

UNIT APPLIANCES				
UNIT APPLIANCE	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
RANGE	43	97.7%	1,505	91.9%
REFRIGERTOR	**44**	**100.0%**	**1,638**	**100.0%**
ICEMAKER	**11**	**25.0%**	**428**	**26.1%**
DISHWASHER	33	75.0%	1,281	78.2%
DISPOSAL	37	84.1%	1,503	91.8%
WASHER / DRYER	20	45.5%	581	35.5%
MICROWAVE	22	50.0%	924	56.4%
UNIT AMENITIES				
UNIT AMENITY	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
AC – CENTRAL	31	70.5%	1,111	67.8%
AC – WINDOW	8	18.2%	415	25.3%
FLOOR COVERING	**44**	**100.0%**	**1,638**	**100.0%**
WASHER / DRYER HOOK-UPS	23	52.3%	853	52.1%
PATIO/DECK/BALCONY	8	18.2%	479	29.2%
CEILING FAN	13	29.6%	309	18.9%
FIREPLACE	3	6.8%	35	2.1%
INTERCOM SYSTEM	10	22.7%	524	32.0%
SECURITY SYSTEM	**0**	**0.0%**	**0**	**0.0%**
WINDOW TREATMENTS	43	92.7%	1,625	99.2%
FURNISHED UNITS	**0**	**0.0%**	**0**	**0.0%**
PROPERTY AMENITIES				
PROPERTY AMENITY	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
POOL	1	2.3%	133	8.1%
ON-SITE MANAGEMENT	15	34.1%	1,088	66.4%
LAUNDRY	21	47.7%	1,043	63.7%
MEETING ROOM	13	29.6%	1,006	61.4%
FITNESS CENTER	6	13.6%	533	32.5%
JACUZZI / SAUNA	3	6.8%	266	16.2%
PLAYGROUND	1	2.3%	39	2.4%
TENNIS / SPORTS COURTS	1	2.3%	133	8.1%
STORAGE	3	6.8%	139	8.5%
SECURITY GATE	1	2.3%	101	6.2%
BUSINESS CENTER	1	2.3%	55	3.4%
PICNIC AREA	**1**	**2.3%**	**30**	**1.8%**
CONCIERGE SERVICE	1	2.3%	110	6.7%
ELEVATOR	**26**	**59.1%**	**1,287**	**78.6%**

Source: VWB Research
Blue Value Lowest
Red Value Highest

Noteworthy observations and trends include the following:

- Of the 44 multi-unit rental properties in the 17 DSAs, common (75% or more of units) unit appliances include: ranges, refrigerators, disposals, and dishwashers. The only uncommon (25% or less of units) unit appliance is an icemaker (26.1%).

- Of the 44 multi-unit rental properties in the 17 DSAs, common unit amenities include: air conditioning (93.1% of units), floor coverings (100.0%), and window treatments (99.2%). Uncommon unit amenities include: ceiling fans (18.9%) and fireplaces (2.1%).

- Of the 44 multi-unit rental properties in the 17 DSAs, the only common property amenity is an elevator (78.6% of units served). Uncommon property amenities include: pools (8.1%), jacuzzis/saunas (16.2%), playgrounds (2.4%), tennis/sports courts (8.1%), supplemental storage (8.5%), security gates (6.2%), business centers (3.4%), picnic areas (1.8%), and concierge services (6.7%).

- DSA laundry facilities are provide as follows: 63.7% of units have access to on-site laundry facilities, 52.1% of units have washer/dryer hook-ups, and 35.5% of units have washer/dryer machines.

- Only a third (34.1%) of the multi-unit rental properties have on-site management, and less than a third of the units have a balcony, patio or deck (29.2%).

2. MULTI-UNIT CONDOMINIUM HOUSING

The following information is extracted from the field survey of 53 multi-unit condominium properties with 2,216 units in 12 DSAs. Five DSAs did not have any multi-unit condominium properties. It should be noted that surveyed condominium properties that were fully or partially under construction at the time of the fieldwork (July 2007) are included in this section, since their units were available for sale. In certain condominium analyses below, established properties (properties where all units have been initially sold) are excluded from consideration, due to the lack of survey information on properties not marketed. These exclusions are noted in applicable places (active only is sometimes used to indicate exclusions).

The following table provides aggregate property and unit information for all surveyed multi-unit condominium housing by DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values. Condominium properties are divided into two status types (established and active), while condominium units are separated between sold and unsold.

DOWNTOWN STUDY AREA	PROPERTIES BY STATUS*			UNITS BY SELLING STATUS			
	ESTABLISHED	ACTIVE	TOTAL	SOLD**	UNSOLD	TOTAL	PERCENT UNSOLD***
ANN ARBOR	6	3	9	541	47	588	25.0%
BATTLE CREEK	0	1	1	0	2	2	100.0%
BAY CITY	3	3	6	109	28	137	29.5%
EAST LANSING	1	2	3	58	19	77	48.7%
FERNDALE	4	0	4	21	0	21	0.0%
FLINT	-	-	-	-	-	-	-
GRAND RAPIDS	6	6	12	642	279	921	35.5%
HOLLAND	1	2	3	57	14	71	35.0%
JACKSON	0	1	1	9	17	26	65.4%
KALAMAZOO	3	1	4	77	1	78	16.7%
LANSING	1	2	3	41	19	60	39.6%
MIDLAND	-	-	-	-	-	-	-
MUSKEGON	0	3	3	54	53	107	49.5%
PONTIAC	-	-	-	-	-	-	-
PORT HURON	4	0	4	128	0	128	0.0%
SAGINAW-NORTH	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-
DSA TOTALS	29	24	53	1,737	479	2,216	-
AVERAGES FOR ALL 17 DSAs	1.7	1.4	3.1	102.2	28.2	130.4	35.8%
AVERAGES FOR 12 DSAs w/ UNITS	2.4	2.0	4.4	144.8	39.9	184.7	35.8%

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)
*Property Status: Established = all units sold / Active = unsold units remain
**Includes established and active units
***Applies to active properties only

Noteworthy observations and trends include the following:

- There are a total of 53 surveyed multi-unit condominium properties that met the study's selection criteria within the 17 Downtown Study Areas (DSAs). This represents an average of 3.1 properties per DSA or 4.4 properties per DSA with condominium units. The Grand Rapids DSA has the highest number of surveyed condominium properties of any DSA. Of these 53 properties, 54.7% are established (all units sold) and 45.3% are active (unsold units still remain). DSAs in Saginaw, Midland, Pontiac, and Flint have no multi-unit condominium properties that met the study's criteria.

- There are a total of 2,216 surveyed condominium units that met the study's selection criteria within the 17 DSAs. On average, this represents 130.4 condominium units per DSA or 184.7 condominium units per DSA with multi-unit condominium properties. The Grand Rapids DSA has the highest number of surveyed condominium units of any DSA. Of the 2,216 total condominium units, 78.4% are sold and 21.6% are unsold. Of the 1,737 sold units, 50.6% are in established properties and 49.4% are in active properties. Of the 1,337 active units, 64.2% are sold and 35.8% are unsold or available. Established properties average 30.3 units in size, while active properties average 55.7. While on average, active properties are 83.8% larger than established properties, there are 17.2% fewer of them.

- There is an average of 41.8 units per surveyed condominium property in the DSAs, with an average unsold rate of 35.8% in the active properties. On average, one out of every three active property units is unsold.

The following table distributes all surveyed condominium units by unit size (number of bedrooms) and selling status (sold or unsold) for each DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values. Three- and four-bedroom unit types are combined into one category, since there are few four-bedroom units.

DOWNTOWN STUDY AREA	UNITS BY BEDROOMS AND SELLING STATUS (ACTIVE PROPERTIES ONLY)							
	STUDIO		ONE-BEDROOM		TWO-BEDROOM		THREE-BEDROOM +	
	SOLD	UNSOLD	SOLD	UNSOLD	SOLD	UNSOLD	SOLD	UNSOLD
ANN ARBOR	7	0	65	22	68	24	1	1
BATTLE CREEK	0	0	0	0	0	2	0	0
BAY CITY	0	0	0	0	4	9	25	19
EAST LANSING	0	2	7	9	13	8	0	0
FERNDALE	-	-	-	-	-	-	-	-
FLINT	-	-	-	-	-	-	-	-
GRAND RAPIDS	15	5	148	93	223	144	121	37
HOLLAND	0	0	10	4	16	10	0	0
JACKSON	0	0	1	3	7	14	1	0
KALAMAZOO	0	0	0	0	5	1	0	0
LANSING	0	0	0	2	25	17	4	0
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	0	0	27	20	23	17	4	16
PONTIAC	-	-	-	-	-	-	-	-
PORT HURON	-	-	-	-	-	-	-	-
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
DSA TOTALS	22	7	258	153	384	246	156	73
PERCENT UNSOLD	-	24.1%	-	37.2%	-	39.1%	-	31.9%
AVERAGES FOR ALL 17 DSAs	1.3	0.4	15.2	9.0	22.6	14.5	9.2	4.3
AVERAGES FOR 10 DSAs w/ ACTIVE PROPERTIES	2.2	0.7	25.8	15.3	38.4	24.6	15.6	7.3

Source: VWB Research
Blue Value Lowest (among DSAs with active properties)
Red Value Highest (among DSAs with active properties)

Noteworthy observations and trends include the following:

- Of all the active multi-unit condominium properties within the DSAs, a two-bedroom unit is the most common type at 48.5%. A one-bedroom unit is the next most common type at 31.6%. Three-bedroom units follow at 16.3%. Studio and four-bedroom unit types are the least common at 2.2% and 1.4%, respectively.

- All of the four-bedroom units are located in the Grand Rapids DSA, while the studio units are only in the Grand Rapids and Ann Arbor DSAs.

- The two-bedroom unit type has the highest percentage of unsold units (39.1%) among all active condominium properties, while the studio unit type has the lowest percentage (24.1%).

The left half of the following table provides aggregate information on surveyed condominium properties by DSA that is best presented in ranges rather than single values. This information includes unit sizes, building height in floors, and quality ratings. The right half of the table separates surveyed condominium property buildings between new construction and older structures with major renovation by DSA.

DOWNTOWN STUDY AREA	UNIT SIZE RANGE*	BUILDING FLOORS RANGE	QUALITY RATING RANGE**	PROPERTIES BY BUILDING TYPE***			
				NEW CONSTRUCTION		MAJOR RENOVATION	
				NUMBER	PERCENT	NUMBER	PERCENT
ANN ARBOR	650-2,700	2.5-26	A	6	66.7%	3	33.3%
BATTLE CREEK	1,401-1,455	2-3	B	0	0.0%	1	100.0%
BAY CITY	1,440-3,260	1-7	B- to A	3	50.0%	3	50.0%
EAST LANSING	525-2,000	3-4	B+ to A-	3	100.0%	0	0.0%
FERNDALE	-	2	-	2	50.0%	2	50.0%
FLINT	-	-	-	-	-	-	-
GRAND RAPIDS	542-3,000	3-32	B+ to A+	3	25.0%	9	75.0%
HOLLAND	1,150-2,900	3-4	A to A+	2	66.7%	1	33.3%
JACKSON	1,154-2,300	3	A-	0	0.0%	1	100.0%
KALAMAZOO	1,000-1,200	3-4.5	B+	0	0.0%	4	100.0%
LANSING	670-1,700	2.5-4	A to A+	3	100.0%	0	0.0%
MIDLAND	-	-	-	-	-	-	-
MUSKEGON	575-1,900	2-5	B+ to A	1	33.3%	2	66.7%
PONTIAC	-	-	-	-	-	-	-
PORT HURON	-	2	-	3	75.0%	1	25.0%
SAGINAW-NORTH	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-
DSA TOTALS OR OVERALL RANGES	525-3,260	1-32	B- to A+	26	-	27	-
AVERAGES FOR ALL 17 DSAs	-	-		1.5	49.1%	1.6	50.9%
AVERAGES FOR 12 DSAs w/ UNITS	-	-		2.2	49.1%	2.3	50.9%

Source: VWB Research
Blue Value Lowest (among DSAs with properties)
Red Value Highest (among DSAs with properties)
*Unit Size is in square feet; values are for active properties only
**Quality Ratings range from A+ (highest) to E (lowest); values for active properties only
***Building Types: New Construction = site cleared and new building constructed from ground up
Major Renovation = old building gutted and reconfigured into new housing units

Noteworthy observations and trends include the following:

- For all multi-unit condominium within DSAs, unit sizes range from 525 square feet to 3,260 square feet.

- Multi-unit condominium property buildings in DSAs range in height from one to 32 floors. This represents a variance factor of 32.0.

- For all active condominium properties within DSAs, quality ratings range from B- to A+. No active condominium property received a quality rating below a B-.

- Of the 53 multi-unit condominium properties in the 17 DSAs, 49.1% were newly constructed, and 50.9% were major renovations of older buildings.

The following table provides aggregate sales information on surveyed multi-unit condominium properties and units by DSA. Unit sales are divided between pre-2000 and post-2000, the overall sales period for each DSA is given, average sale prices by property type are shown, and average sales rates are indicated in the far right column.

DOWNTOWN STUDY AREA	SALES PER TIME PERIOD				OVERALL SALES PERIOD*	AVERAGE SALE PRICE**		AVERAGE SALES RATE***
	BEFORE 2000		2000 TO 7/2007			ESTABLISHED	ACTIVE	
	#	%	#	%				
ANN ARBOR	**344**	63.6%	197	36.4%	10/86 to 7/07	$162,225	**$400,216**	3.6
BATTLE CREEK	**0**	**0.0%**	**0**	**0.0%**	1/07 to 7/07	-	-	-
BAY CITY	42	38.5%	67	61.5%	4/98 to 7/07	$265,933	$328,643	0.9
EAST LANSING	**0**	**0.0%**	58	**100.0%**	5/02 to 7/07	$193,025	$163,932	3.6
FERNDALE	**0**	**0.0%**	21	**100.0%**	11/02 to 6/05	$148,224	-	1.0
FLINT	-	-	-	-	-	-	-	-
GRAND RAPIDS	7	1.1%	**635**	98.9%	8/99 to 7/07	$227,165	$320,937	**10.3**
HOLLAND	19	33.3%	38	66.7%	11/98 to 7/07	**$90,886**	$317,500	0.4
JACKSON	**0**	**0.0%**	9	**100.0%**	4/05 to 7/07	-	$288,333	**0.3**
KALAMAZOO	13	16.9%	64	83.1%	8/89 to 7/07	$136,989	$225,000	0.6
LANSING	**0**	**0.0%**	41	**100.0%**	7/00 to 7/07	$252,945	$179,525	0.7
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	**0**	**0.0%**	54	**100.0%**	4/02 to 7/07	-	**$157,409**	0.5
PONTIAC	-	-	-	-	-	-	-	-
PORT HURON	128	**100.0%**	**0**	**0.0%**	**12/82** to 4/99	**$347,111**	-	1.2
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
DSA TOTALS OR OVERALL RANGES	553	-	1,184	-	12/82 to 7/07	-	-	-
AVERAGES FOR ALL 17 DSAs	32.5	31.8%	69.7	68.2%	-	$107,324	$140,088	1.4
AVERAGES FOR 12 DSAs w/ UNITS	46.1	31.8%	98.7	68.2%	-	$152,042	$198,458	1.9
				AVERAGES FOR DSAs w/ VALUES		$202,723	$264,611	2.1

Source: VWB Research
Blue Value Lowest (among DSAs with properties)
Red Value Highest (among DSAs with properties)
*Overall Sales Period = first sales date to last sales date; cut-off date for study was 7/2007
**Average weighted by unit counts
***Average Sales Rate = average number of units sold per month; calculated on active sales periods; for active properties, active sales periods extend to July 2007 (study cut-off date); weighted by sold unit count.

Noteworthy observations and trends include the following:

- Of the total 1,737 condominium units sold within DSAs, 31.8% were purchased prior to the year 2000, while 68.2% were bought between 2000 and July 2007 (study cut-off date). Over two-thirds of condominium unit sales in DSAs have occurred since the year 2000.

- The earliest sale date for a surveyed condominium property within this study is December 1982 in the Port Huron DSA.

- The average weighted (by unit count) sale price for all DSAs with established condominium properties is $202,723. The average weighted (by unit count) sale price for all DSAs with active condominium properties is $264,611. The 30.5% increase in value is most likely attributable to time, since established properties were completed and sold before active properties.

- The average weighted (by sold unit count) sales rate for all multi-unit condominium properties within DSAs is 2.1 units per month.

The following table provides aggregate appliance, amenity, and association information on all surveyed active condominium properties and units (except the Shearer Building in Bay City). This represents 23 properties and 1,325 units. For each appliance, amenity and association service, the number and percentage of affected properties and units are shown. Appliances, amenities, and services with high percentages (greater than 75%) are commonly offered, whereas those with low percentages (less than 25%) are rarely offered. At the bottom of the table, monthly association fee information is provided

UNIT APPLIANCES (ACTIVE PROPERTIES ONLY)				
	PROPERTIES		UNITS	
UNIT APPLIANCE	NUMBER	PERCENT	NUMBER	PERCENT
RANGE	21	91.3%	1,291	97.4%
REFRIGERTOR	21	91.3%	1,291	97.4%
DISHWASHER	21	91.3%	1,291	97.4%
DISPOSAL	21	91.3%	1,291	97.4%
WASHER / DRYER	11	47.8%	576	43.5%
MICROWAVE	14	60.9%	955	72.1%

UNIT AMENITIES (ACTIVE PROPERTIES ONLY)				
	PROPERTIES		UNITS	
UNIT AMENITY	NUMBER	PERCENT	NUMBER	PERCENT
AIR CONDITIONING	21	91.3%	1,291	97.4%
WASHER / DRYER HOOK-UPS	18	78.3%	1,013	76.5%
SECURITY SYSTEM	2	8.7%	271	20.5%
CARPET	10	43.5%	791	59.7%
WINDOW TREATMENTS	21	91.3%	1,291	97.4%
FIREPLACE	3	13.0%	66	5.0%
CEILING FAN	5	21.7%	105	7.9%
BALCONY	15	65.2%	1,088	82.1%
PATIO	1	4.4%	230	17.4%
VAULTED CEILINGS	1	4.4%	230	17.4%

PROPERTY AMENITIES (ACTIVE PROPERTIES ONLY)				
	PROPERTIES		UNITS	
PROPERTY AMENITY	NUMBER	PERCENT	NUMBER	PERCENT
POOL	5	21.7%	655	49.4%
FITNESS CENTER	7	30.4%	545	41.1%
SAUNA	2	8.7%	248	18.7%
HOT TUB	4	17.4%	658	49.7%
JOG / BIKE TRAIL	2	8.7%	62	4.7%
TENNIS / SPORTS COURTS	0	0.0%	0	0.0%
PLAYGROUND	0	0.0%	0	0.0%
COMMON BUILDING	4	17.4%	643	48.5%
CLUB HOUSE	4	17.4%	463	34.9%
ON-SITE MANAGEMENT	4	17.4%	558	42.1%
LAUNDRY FACILITY	1	4.4%	38	2.9%
STORAGE	2	8.7%	90	6.8%
SECURITY GATE	3	13.0%	447	33.7%
ELEVATOR	18	78.3%	1,106	83.5%
WATER FEATURE	3	13.0%	99	7.5%

ASSOCATION FEE SERVICES (ACTIVE PROPERTIES ONLY)				
	PROPERTIES		UNITS	
SERVICE	NUMBER	PERCENT	NUMBER	PERCENT
CONCIERGE SERVICES	1	4.4%	207	15.6%
WATER & SEWER	17	73.9%	1,167	88.1%
MANAGEMENT SERVICES	3	13.0%	193	14.6%
PAVED AREA MAINTENANCE	22	95.7%	1,279	96.5%
SNOW REMOVAL	23	100.0%	1,325	100.0%
TRASH REMOVAL	23	100.0%	1,325	100.0%
LAWN / LANDSCAPING	23	100.0%	1,325	100.0%

ASSOCATION FEES	
AVERAGE MONTHLY FEE FOR ALL ACTIVE DSA CONDOMINIUM PROPERTIES*	MONTHLY FEE RANGE FOR ALL ACTIVE DSA CONDOMINIUM PROPERTIES
$312.42	$90 - $750

Source: VWB Research
*Average weighted by unit counts
Blue Value Lowest
Red Value Highest

Noteworthy observations and trends include the following:

- Of the 23 active multi-unit condominium properties in the 17 DSAs, common (75% or more of units) unit appliances include: ranges, refrigerators, disposals, and dishwashers (all at 97.4% of units). These four appliances are not 100.0% because two properties are selling "shell-only" units. The least common unit appliances are washer/dryer machines (43.5% of units).

- Of the 23 active multi-unit condominium properties in the 17 DSAs, common unit amenities include: air conditioning (97.4%), window treatments (97.4%), balconies (82.1%), and washer/dryer hook-ups (76.5%). Air conditioning and window treatments are not 100.0% because two properties are selling "shell-only" units. Uncommon unit amenities include: ceiling fans (7.9%), fireplaces (5.0%), security systems (20.5%), patios (17.4%), and vaulted ceilings (17.4%).

- Of the 23 active multi-unit condominium properties in the 17 DSAs, the only common property amenity is an elevator (83.5% of units served). Uncommon property amenities include: saunas (18.7%), jog/bike trails (4.7%), supplemental storage (6.8%), laundry facilities (2.9%), and water features (7.5%).

- Of the 23 active multi-unit condominium properties in the 17 DSAs, common services under the association fee include: snow removal, trash removal, landscaping (all at 100.0% of units), water and sewer (88.1%), and paved area maintenance (96.5%). Uncommon services include: on-site management (14.6%) and concierge services (15.6%).

- The average monthly association fee for all active condominium properties in this study is $312.42. The range of average monthly fees is from a low of $90 to a high of $750. This represents a spread factor of 8.3 times.

- DSA laundry facilities are provided as follows: 2.9% of units have access to on-site laundry rooms, 76.5% of units have washer/dryer hook-ups, and 43.5% of units have washer/dryer machines.

- Only 20.5% of the active condominium units have security systems, and only 33.7% of the properties have security gates.

- Parking in surveyed active condominium properties is provided as follows: 53.6% of units have one parking space and 46.4% have two parking spaces. Of the 1,958 parking spaces in active condominium properties, 81.1% are in concrete parking garages, 8.2% are in attached residential garages, 7.4% are in open surface lots, and 3.3% are in detached residential garages.

3. MULTI-UNIT HOUSING (RENTAL AND CONDOMINIUM COMBINED)

In this section, surveyed multi-unit rental and condominium property information is combined for comparisons and analyses. Information is extracted from the field survey of 97 multi-unit housing properties with 3,854 units in 14 DSAs. Three DSAs did not have any multi-unit housing properties that met the study's selection criteria. As a reminder, surveyed rental properties that were under construction at the time of the fieldwork (July 2007) are excluded from this section. Only available or leaseable units are analyzed. Further, surveyed condominium properties that were under construction at the time of the fieldwork (July 2007) are included in this section, since their units were available for sale. In certain analyses below, established condominium properties (properties where all units have been initially sold) are excluded from consideration, due to the lack of survey information on properties not being marketed. These exclusions are noted in applicable places (active only is sometimes used to indicate exclusions). Information in this section was chosen on the basis that it applied to both rental and condominium properties and units. If data could not be combined properly, its was not used in this section.

The following table provides aggregate property and unit information for all surveyed multi-unit housing by DSA. In addition, DSA aggregate totals and averages are provided to allow comparisons between DSAs and with DSA aggregate values. Surveyed multi-unit housing properties and units are divided between rentals and condominiums, while vacancy and unsold percentages are also provided by DSA.

DOWNTOWN STUDY AREA	PROPERTIES BY TYPE*			UNITS BY PROPERTY TYPE*				
	RENTAL	CONDO	TOTAL	RENTAL	PERCENT VACANT	CONDO	PERCENT UNSOLD**	TOTAL
ANN ARBOR	3	9	12	186	3.2%	588	25.0%	774
BATTLE CREEK	1	1	2	13	38.5%	2	100.0%	15
BAY CITY	1	6	7	11	0.0%	137	29.5%	148
EAST LANSING	2	3	5	53	0.0%	77	48.7%	130
FERNDALE	1	4	5	22	9.1%	21	0.0%	43
FLINT	6	0	6	188	8.5%	0	0.0%	188
GRAND RAPIDS	6	12	18	373	15.3%	921	35.5%	1,294
HOLLAND	0	3	3	0	0.0%	71	35.0%	71
JACKSON	0	1	1	0	0.0%	26	65.4%	26
KALAMAZOO	9	4	13	156	1.3%	78	16.7%	234
LANSING	7	3	10	327	2.5%	60	39.6%	387
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	3	3	6	253	17.0%	107	49.5%	360
PONTIAC	4	0	4	52	11.5%	0	0.0%	52
PORT HURON	1	4	5	4	25.0%	128	0.0%	132
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
DSA TOTALS	44	53	97	1,638	-	2,216	-	3,854
AVERAGES FOR ALL 17 DSAs	2.6	3.1	5.7	96.4	8.9%	130.4	35.8%	226.7
AVERAGES FOR 14 DSAs w/ UNITS	3.1	3.8	6.9	117.0	8.9%	158.3	35.8%	275.3

Source: VWB Research
Blue Value Lowest (among DSAs with units)
Red Value Highest (among DSAs with units)
*Rental excludes units under construction and condo includes both active and established properties
**Applies to active condominium properties only

Noteworthy observations and trends include the following:

- In Battle Creek, there is only one condominium property on the market with the first two units under construction. As of the study cut-off date, neither unit was sold; thus, 100% of the units are unsold.

- There are a total of 97 surveyed multi-unit housing properties that met the study's selection criteria within the 17 Downtown Study Areas. This represents an average of 5.7 properties per DSA or 6.9 properties per DSA with multi-unit housing properties. Of these 97 properties, 45.4% are rental (for lease) and 54.6% are condominium (for sale). Of the DSAs with surveyed multi-unit housing properties, the Grand Rapids DSA has the most with 18, while the Jackson DSA has the least with one. DSAs in Saginaw and Midland have no multi-unit housing properties that met the study's criteria.

- There are a total of 3,854 surveyed housing units that met the study's selection criteria within the 17 DSAs. On average, this represents 226.7 housing units per DSA or 275.3 housing units per DSA with multi-unit housing properties. Of the DSAs with surveyed multi-unit housing units, the Grand Rapids DSA has the most with 1,294 (33.6% of all surveyed units), while the Battle Creek DSA has the least with 15. Of the 3,854 total housing units, 42.5% are in rental properties and 57.5% are in condominium properties. Of the 1,638 total rental units, 8.9% are vacant and 91.1% are occupied. Of the 2,216 total condominium units, 78.4% have been initially sold and 21.6% have never been sold and are currently available. Of the 24 active condominium properties with available units, 35.8% are unsold. On average, surveyed multi-unit housing properties in DSAs contain 39.7 units, with rental properties averaging 37.2 units and condominium properties averaging 41.8 units.

- There are 20.5% more multi-unit condominium properties in the DSAs than multi-unit rental properties, and they are 35.3% bigger in terms of the number of units.

- On average, one out of every 11 surveyed rental units is vacant, while one out of every five condominium units is unsold (for active properties, one out of every three units is unsold).

The following table distributes average weighted (by unit count) unit sizes by number of bedrooms (studios to three-bedrooms), housing type, and DSA. For condominiums, only active properties are included.

DOWNTOWN STUDY AREA	UNIT SIZES BY BEDROOMS AND PROPERTY TYPE*							
	STUDIOS		ONE-BEDROOM		TWO-BEDROOM		THREE-BEDROOM	
	RENTAL	CONDO**	RENTAL	CONDO**	RENTAL.	CONDO**	RENTAL	CONDO**
ANN ARBOR	425	650	563	991	826	1,585	863	1,978
BATTLE CREEK	-	-	1,170	-	1,600	1,428	-	-
BAY CITY	350	-	500	-	900	1,906	-	2,383
EAST LANSING	450	539	663	569	1,030	1,175	-	-
FERNDALE	-	-	525	-	-	-	-	-
FLINT	375	-	642	-	1,171	-	1,125	-
GRAND RAPIDS	475	575	684	975	945	1,481	1,222	1,879
HOLLAND	-	-	-	1,150	-	1,875	-	-
JACKSON	-	-	673	1,162	1,058	1,612	1,243	2,308
KALAMAZOO	475	-	1,184	-	1,341	1,100	1,225	-
LANSING	685	-	925	670	1,248	1,212	1,461	1,250
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	410	-	711	738	1,041	1,194	1,361	1,700
PONTIAC	713	-	608	-	808	-	-	-
PORT HURON	-	-	750	-	1,200	-	2,200	-
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
OVERALL RANGES	350 to 713	539 to 650	500 to 1,184	569 to 1,162	808 to 1,600	1,100 to 1,906	863 to 2,200	1,250 to 2,383
AVERAGES FOR DSAs w/ VALUES	484	588	738	894	1,097	1,457	1,338	1,916
VARIANCE	CONDO 104 SF BIGGER		CONDO 156 SF BIGGER		CONDO 360 SF BIGGER		CONDO 578 SF BIGGER	

Source: VWB Research
Blue Value Lowest
Red Value Highest
*All values are in square feet; values are averages weighted by unit count
**Active condominium properties only

Noteworthy observations and trends include the following:

- For DSAs with studio units, condominium units on average are 21.5% larger than rental units (104 square feet bigger).
- For DSAs with one-bedroom units, condominium units on average are 21.1% larger than rental units (156 square feet bigger).
- For DSAs with two-bedroom units, condominium units on average are 32.8% larger than rental units (360 square feet bigger).
- For DSAs with three-bedroom units, condominium units on average are 43.2% larger than rental units (578 square feet bigger).
- On average for all DSAs with multi-unit housing properties, condominium units are larger than rental units in every size category from studio to three-bedroom units.

The left half of the following table divides all surveyed multi-unit housing property buildings between new construction and older structures with renovations by DSA. The right half of the table provides information on surveyed multi-unit housing properties that is best presented in ranges rather than single values. This information includes unit sizes by housing type and building height in floors.

DOWNTOWN STUDY AREA	PROPERTIES BY BUILDING TYPE*				UNIT SIZE RANGE		BUIILDING FLOORS RANGE
	NEW CONSTRUCTION (RENTAL & CONDO)		RENOVATED BUILDING (RENTAL & CONDO)				
	NUMBER	PERCENT	NUMBER	PERCENT	RENTAL	CONDO	
ANN ARBOR	7	58.3%	5	41.7%	425-1,024	650-2,700	2.5-26
BATTLE CREEK	0	0.0%	2	100.0%	1,140-1,600	1,401-1,455	2-20
BAY CITY	3	42.9%	4	57.1%	350-900	1,440-3,260	1-7
EAST LANSING	4	80.0%	1	20.0%	400-1,400	525-2,000	3-5
FERNDALE	2	40.0%	3	60.0%	525	-	2-2.5
FLINT	2	33.3%	4	66.7%	375-1,400	-	2-6
GRAND RAPIDS	5	27.8%	13	72.2%	458-1,700	542-3,000	3-32
HOLLAND	2	66.7%	1	33.3%	-	1,150-2,900	3-4
JACKSON	0	0.0%	1	100.0%	-	1,154-2,300	3
KALAMAZOO	3	23.1%	10	76.9%	300-3,000	1,000-1,200	2-21
LANSING	4	40.0%	6	60.0%	580-2,850	670-1,700	2-9
MIDLAND	-	-	-	-	-	-	-
MUSKEGON	2	33.3%	4	66.7%	370-1,489	575-1,900	2-5
PONTIAC	0	0.0%	4	100.0%	425-1,000	-	2-8
PORT HURON	3	60.0%	2	40.0%	900-2,200	-	2-3
SAGINAW-NORTH	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-
DSA TOTALS OR OVERALL RANGES	37	-	60	-	300-3,000	525-3,260	1-32
AVERAGES FOR ALL 17 DSAs	2.2	38.1%	3.5	61.9%	-	-	-
AVERAGES FOR 14 DSAs w/ UNITS	2.6	38.1%	4.3	61.9%	-	-	-

Source: VWB Research
Blue Value Lowest (among DSAs with properties)
Red Value Highest (among DSAs with properties)
*Building Types: New Construction = site cleared and new building constructed from ground up
Major Renovation = old building gutted and reconfigured into new housing units

Noteworthy observations and trends include the following:

- Of the 97 surveyed multi-unit housing properties in the 17 DSAs, 38.1% were newly constructed, and 61.9% were renovations of older buildings. This represents nearly a one-third/two-third split.

- Of the 14 DSAs with multi-unit housing properties, all have at least one renovated older building property and 10 (71.4%) have more than half of their total properties in renovated older buildings.

- Of the 14 DSAs with multi-unit housing properties, unit sizes range from 300 square feet to 3,260 square feet.

- Of the 14 DSAs with multi-unit housing properties, buildings range in height from one to 32 floors. This represents a variance factor of 32.0.

The following table provides appliance and amenity information on all surveyed rental housing properties and units and all active condominium properties and units (except the Shearer Building in Bay City). This represents 67 properties and 2,963 units. For each appliance and amenity, the number and percentage of affected properties and units are shown. Appliances and amenities with high percentages (greater than 75%) are commonly offered, whereas appliances and amenities with low percentages (less than 25%) are rarely offered.

UNIT APPLIANCES (ALL RENTALS & ACTIVE CONDOS)				
UNIT APPLIANCE	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
RANGE	64	95.5%	2,796	94.4%
REFRIGERTOR	**65**	**97.0%**	**2,929**	**98.9%**
DISHWASHER	54	80.6%	2,572	86.8%
DISPOSAL	58	86.6%	2,794	94.3%
WASHER / DRYER	**31**	**46.3%**	**1,157**	**39.0%**
MICROWAVE	36	53.7%	1,879	63.4%
UNIT AMENITIES (ALL RENTALS & ACTIVE CONDOS)				
UNIT AMENITY	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
AIR CONDITIONING	60	89.6%	2,817	95.1%
WASHER / DRYER HOOK-UPS	41	61.2%	1,866	63.0%
PATIO / DECK / BALCONY	24	35.8%	1,797	60.7%
CEILING FAN	18	26.9%	414	14.0%
FIREPLACE	6	9.0%	101	3.4%
SECURITY SYSTEM	**2**	**3.0%**	**271**	**9.2%**
WINDOW TREATMENTS	**64**	**95.5%**	**2,916**	**98.4%**
PROPERTY AMENITIES (ALL RENTALS & ACTIVE CONDOS)				
PROPERTY AMENITY	PROPERTIES		UNITS	
	NUMBER	PERCENT	NUMBER	PERCENT
POOL	6	9.0%	788	26.6%
ON-SITE MANAGEMENT	19	28.4%	1,646	55.6%
LAUNDRY	22	31.3%	1,081	36.5%
MEETING ROOM	17	25.4%	1,649	55.7%
FITNESS CENTER	13	19.4%	1,078	36.4%
JACUZZI/SAUNA	9	13.4%	1,172	39.6%
PLAYGROUND	**1**	**1.5%**	**39**	**1.3%**
TENNIS / SPORTS COURTS	1	1.5%	133	4.5%
STORAGE	5	7.5%	229	7.7%
SECURITY GATE	4	6.0%	548	18.5%
ELEVATOR*	**58**	**59.8%**	**3,108**	**80.6%**

Source: VWB Research
Blue Value Lowest
Red Value Highest
*Elevator values are based on all rental properties/units and all condominium properties/units (active and established)

Noteworthy observations and trends include the following:

- Of the 97 multi-unit housing properties in the 17 DSAs, common (75% or more of units) unit appliances include: ranges (94.4% of units), refrigerators (98.9%), disposals (94.3%), and dishwashers (86.8%). The least common unit appliances are washer/dryer machines (39.0% of units).

- Of the 97 multi-unit housing properties in the 17 DSAs, common unit amenities include: air conditioning (95.1%) and window treatments (98.4%). Uncommon unit amenities include: ceiling fans (14.0%), fireplaces (3.4%), and security systems (9.2%).

- Of the 97 multi-unit housing properties in the 17 DSAs, the only common property amenity is an elevator (80.6% of units served). Uncommon property amenities include: playgrounds (1.3%), tennis/sports courts (4.5%), supplemental storage (7.7%), and security gates (18.5%).

- DSA laundry facilities are provided as follows: 36.5% of units have access to on-site laundry facilities, 63.0% of units have washer/dryer hook-ups, and 39.0% of units have washer/dryer machines.

- Only 9.2% of the surveyed multi-unit housing units in DSAs have security systems, and only 18.5% have security gates.

The next two tables in this section quantify and rank the amount of surveyed multi-unit housing as a function of a location's size (number of households; both on a DSA and citywide basis). In the first table, we have taken the number of surveyed housing units within a DSA and divided them by the estimated (2007) number of citywide and DSA households for each study location. This was done for rental, condominium, and total housing units. The results appear below under the heading of "Surveyed Housing Units Per Household". If a location did not have any surveyed housing units, it received a "zero" ratio value.

DOWNTOWN STUDY AREA	2007 TOTAL HOUSEHOLDS*		SURVEYED HOUSING UNITS PER HOUSEHOLD**					
			RENTAL UNITS		CONDO UNITS		TOTAL UNITS	
	CITYWIDE	DSA	CITYWIDE	DSA	CITYWIDE	DSA	CITYWIDE	DSA
ANN ARBOR	46,071	1,144	.0040	.1626	**.0128**	**.5140**	.0168	.6766
BATTLE CREEK	21,380	**16**	.0006	.8125	.0001	.1250	.0007	.9375
BAY CITY	14,723	592	.0007	.0186	.0093	.2314	.0100	.2500
EAST LANSING	14,339	379	.0037	.1398	.0054	.2032	.0091	.3430
FERNDALE	**9,796**	1,131	.0022	.0195	.0021	.0186	.0044	.0380
FLINT	46,346	261	.0041	.7203	**.0000**	**.0000**	.0041	.7203
GRAND RAPIDS	**72,627**	**2,259**	.0051	.1651	.0127	.4077	.0178	.5728
HOLLAND	11,828	261	**.0000**	**.0000**	.0060	.2720	.0060	.2720
JACKSON	13,433	266	**.0000**	**.0000**	.0019	.0977	.0019	.0977
KALAMAZOO	28,246	435	.0055	.3586	.0028	.1793	.0083	.5379
LANSING	48,047	1,472	.0068	.2222	.0013	.0408	.0081	.2629
MIDLAND	17,251	191	**.0000**	.0052	**.0000**	**.0000**	**.0000**	**.0000**
MUSKEGON	14,482	300	**.0175**	**.8433**	.0074	.3567	**.0249**	**1.200**
PONTIAC	24,643	481	.0021	.1081	**.0000**	**.0000**	.0021	.1081
PORT HURON	12,723	544	.0003	.0074	.0101	.2353	.0104	.2427
SAGINAW (N & S)	21,313	195 / 66	**.0000**	**.0000**	**.0000**	**.0000**	**.0000**	**.0000**
TOTAL	417,248	9,993	-	-	-	-	-	-
AVERAGE	26,078	588	-	-	-	-	-	-

Blue Value Lowest
Red Value Highest
*Source: 2000 Census; Claritas, Inc.
**Source: 2000 Census; Claritas, Inc.; VWB Research

Noteworthy observations and trends include the following:

- If the number of households alone determined the amount of multi-unit housing in a downtown area, the ratio values in the above six right columns would be similar. However, since these ratio values vary greatly (from .0000 to 1.200), there does not appear to be a direct relationship. Clearly, factors other than just the number of households affect the amount of multi-unit housing in a downtown area.

To further understand the data in the "Surveyed Housing Units Per Household" section of the above table, we have generated the following table that uses the above data to rank order the study locations. The location with the most "DSA surveyed units per household" appears at the top of each column of the following table and the location with the fewest "DSA surveyed units per household" appears at the bottom.

LOCATIONS BY UNIT TYPE AND GEOGRAPHIC AREA RANKED ON SURVEYED HOUSING UNITS PER HOUSEHOLD							
	RENTAL UNITS		CONDO UNITS		TOTAL UNITS		
RANK	CITYWIDE	DSA	CITYWIDE	DSA	CITYWIDE	DSA	RANK
1	**MUSKEGON**	**MUSKEGON**	**ANN ARBOR**	**ANN ARBOR**	**MUSKEGON**	**MUSKEGON**	1
2	LANSING	BATTLE CREEK	GRAND RAPIDS	GRAND RAPIDS	GRAND RAPIDS	BATTLE CREEK	2
3	KALAMAZOO	FLINT	PORT HURON	MUSKEGON	ANN ARBOR	FLINT	3
4	GRAND RAPIDS	KALAMAZOO	BAY CITY	HOLLAND	PORT HURON	ANN ARBOR	4
5	FLINT	LANSING	MUSKEGON	PORT HURON	BAY CITY	GRAND RAPIDS	5
6	ANN ARBOR	GRAND RAPIDS	HOLLAND	BAY CITY	EAST LANSING	KALAMAZOO	6
7	EAST LANSING	ANN ARBOR	EAST LANSING	EAST LANSING	KALAMAZOO	EAT LANSING	7
8	FERNDALE	EAST LANSING	KALAMAZOO	KALAMAZOO	LANSING	HOLLAND	8
NORM – MIDPOINT							
9	PONTIAC	PONTIAC	FERNDALE	BATTLE CREEK	HOLLAND	LANSING	9
10	BAY CITY	FERNDALE	JACKSON	JACKSON	FERNDALE	BAY CITY	10
11	BATTLE CREEK	BAY CITY	LANSING	LANSING	FLINT	PROT HURON	11
12	PORT HURON	PORT HURON	BATTLE CREEK	FERNDALE	PONTIAC	PONTIAC	12
13	HOLLAND	HOLLAND	MIDLAND	MIDLAND	JACKSON	JACKSON	13
14	JACKSON	JACKSON	SAGINAW	SAGINAW	BATTLE CREEK	FERNDALE	14
15	MIDLAND	MIDLAND	PONTIAC	PONTIAC	MIDLAND	MIDLAND	15
16	**SAGINAW**	**SAGINAW**	**FLINT**	**FLINT**	**SAGINAW**	**SAGINAW**	16

Source: 2000 Census; Claritas, Inc. & VWB Research

Red locations are above the norm for the number of surveyed units per household; **bolded red locations** have the most surveyed units per household for that unit type and geographic population area.

Blue locations are below the norm for the number of surveyed units per household; **bolded blue locations** have the least surveyed units per household for that unit type and geographic population area.

Noteworthy observations and trends include the following:

- Muskegon has the most DSA rental units (that met the study's selection criteria) for its size both in terms of the DSA and city. Lansing is second on a citywide size basis, while Battle Creek is second on a DSA size basis. For locations with DSA rental units, Port Huron has the least for its size both in terms of the DSA and city. Saginaw is the largest city and DSA in the study without any surveyed rental units in its DSA.

- Ann Arbor has the most DSA condominium units (that met the study's selection criteria) for its size both in terms of the DSA and city. Grand Rapids is second. For locations with DSA condominium units, Battle Creek has the least on a citywide size basis, while Ferndale has the least on a DSA size basis. Flint is the largest city in the study without any surveyed condominium units in its DSA, while Pontiac is the largest DSA in the study without any surveyed condominium units in its DSA.

- Muskegon has the most DSA multi-unit housing (that met the study's selection criteria) for its size both in terms of the DSA and city. Grand Rapids is second on a citywide size basis, while Battle Creek is second on a DSA size basis. For locations with DSA multi-unit housing, Battle Creek has the least on a citywide size basis, while Ferndale has the least on a DSA size basis. Saginaw is the largest city and DSA in the study without any surveyed multi-unit housing in its DSA.

- In general, red locations in the "Total Units-Citywide" column have a larger than normal/average supply of DSA multi-unit housing for their city size, while red locations in the "Total Units-DSA" column have a larger than normal/average supply of DSA multi-unit housing for their DSA size.

- In general, blue locations in the "Total Units-Citywide" column have a smaller than normal/average supply of DSA multi-unit housing for their city size, while blue locations in the "Total Units-DSA" column have a smaller than normal/average supply of DSA multi-unit housing for their DSA size.

The final table in this section summarizes all surveyed multi-unit housing in all DSAs under this study (except Canton Township SA). Properties and units are distributed by DSA, property type (rental or condominium), and development status (planned, being built, or built).

MULTI-UNIT HOUSING SUMMARY								
	RENTAL PROPERTIES				RENTAL UNITS			
DOWNTOWN STUDY AREA	**PLANNED**	**BEING BUILT**	**BUILT**	**TOTAL**	**PLANNED**	**BEING BUILT**	**BUILT**	**TOTAL**
ANN ARBOR	2	0	3	5	187	0	186	373
BATTLE CREEK	0	0	1	1	0	0	13	13
BAY CITY	1	0	1	2	15	0	11	26
EAST LANSING	0	0	2	2	0	0	53	53
FERNDALE	0	0	1	1	0	0	22	22
FLINT	2	1	6	9	124	8	188	320
GRAND RAPIDS	4	1	6	11	182	42	373	597
HOLLAND	1	0	0	1	24	0	0	24
JACKSON	0	2	0	2	0	80	0	80
KALAMAZOO	0	0	9	9	0	0	156	156
LANSING	1	2	7	10	48	78	327	453
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	0	0	3	3	0	0	253	253
PONTIAC	1	0	4	5	34	0	52	86
PORT HURON	3	1	1	5	22	6	4	32
SAGINAW-NORTH	-	-	-	-	-	-	-	-
SAGINAW-SOUTH	-	-	-	-	-	-	-	-
DSA TOTALS	15	7	44	66	636	214	1,638	2,488
AVERAGES FOR DSAs w/ VALUES	1.9	1.4	3.7	4.7	79.5	42.8	136.5	177.1
	CONDOMINIUM PROPERTIES				**CONDOMINIUM UNITS**			
DOWNTWN STUDY AREA	**PLANNED**	**BEING BUILT**	**BUILT**	**TOTAL**	**PLANNED**	**BEING BUILT**	**BUILT**	**TOTAL**
ANN ARBOR	5	1	8	14	297	99	489	885
BATTLE CREEK	0	1	0	1	22	2	0	24
BAY CITY	1	0	6	7	20+	0	137	157
EAST LANSING	3	1	2	6	80+	7	70	157
FERNDALE	3	0	4	7	65	0	21	86
FLINT	-	-	-	-	-	-	-	-
GRAND RAPIDS	7	2	10	19	328	325	596	1,249
HOLLAND	0	0	3	3	0	0	71	71
JACKSON	0	0	1	1	0	0	26	26
KALAMAZOO	0	0	4	4	0	0	78	78
LANSING	2	1	2	5	10	20	40	70
MIDLAND	-	-	-	-	-	-	-	-
MUSKEGON	3	0	3	6	178	12	95	285
PONTIAC	-	-	-	-	-	-	-	-
PORT HURON	0	0	4	4	4	0	128	132
SAGINAW-NORTH	1	0	0	1	24	0	0	24
SAGINAW-SOUTH	1	0	0	1	10	0	0	10
DSA TOTALS	26	6	47	79	1,038	465	1,751	3,254
AVERAGES FOR DSAs w/ VALUES	2.9	1.2	4.3	5.6	94.4	77.5	159.2	232.4
GRAND TOTALS	**41**	**13**	**91**	**145**	**1,674**	**679**	**3,389**	**5,742**
AVERAGES FOR ALL 17 DSAs	**2.4**	**0.8**	**5.4**	**8.5**	**98.5**	**39.9**	**199.4**	**337.8**

Source: VWB Research

Blue Value Lowest (among DSAs w/ units)

Red Value Highest (among DSAs w/ units)

Noteworthy observations and trends include the following:

- There are 66 surveyed multi-unit rental housing properties planned, being built, or built within all DSAs representing 2,488 units. Of these 2,488 surveyed rental units, 636 (25.6%) are planned, 214 (8.6%) are being built, and 1,638 (65.8%) are built and operating.

- There are 79 surveyed multi-unit condominium housing properties planned, being built, or built within all DSAs representing 3,254 units. Of these 3,254 surveyed condominium units, 1,038 (31.9%) are planned, 465 (14.3%) are being built, and 1,751 (53.8%) are built.

- Combined, there are 145 surveyed multi-unit housing properties planned, being built, or built within all DSAs representing 5,742 units. Of these 5,742 surveyed condominium units, 1,674 (29.2%) are planned, 679 (11.8%) are being built, and 3,389 (59.0%) are built. Four out of 10 units identified in this study are planned or being built.

- Of the 3,389 total units built, 48.3% are rentals and 51.7% are condominiums. Of the 679 total units being built, 31.5% are rentals and 68.5% are condominiums. Of the 1,674 total units planned, 636 (38.0%) are rentals and 1,038 (62.0%) are condominiums. While in total there are similar numbers of built rental and condominium units, there are twice as many condominiums being built than rentals, and nearly twice as many condominiums being planned than rentals.

- The top three DSAs in terms of total rental units (planned, being built, and built) are Grand Rapids, Lansing, and Ann Arbor. The DSAs of Midland, Saginaw-North, and Saginaw-South have no multi-unit rental properties that are planned, being built, or built.

- The top three DSAs in terms of total condominium units (planned, being built, and built) are Grand Rapids, Ann Arbor, and Muskegon. The DSAs of Flint, Midland, and Pontiac have no multi-unit condominium properties that are planned, being built, or built.

- The average size for all multi-unit housing properties in DSAs (planned, being built, or built) is around 40 units whether it is for rent (37.7 unit average) or for sale (41.2 unit average).

- Eight out of 17 DSAs have no rental units planned or being built, seven out of 17 DSAs have no condominium units planned or being built, and two out of 17 DSAs have no multi-unit housing units planned or being built.

C. ATTITUDINAL SURVEYS

To gain perspective on the three major contributors driving downtown multi-unit housing, we administered attitudinal surveys to city officials (facilitators), developers/owners (creators/operators), and residents (users). These surveys and their results are discussed in this section. Samples of the survey instruments appear in Addenda B through E of Volume 1 of this study.

1. CITY SURVEY

A 25-question survey was sent to the "downtown housing expert" in each of the 16 DSA cities. This individual was typically the city's director of planning and community development or executive director of the downtown development authority. A completed survey was received back from every DSA city. There are 17 close-ended questions and eight open-ended questions. The results of the city survey are summarized below:

Question No. 1: *Indicate your city.* Since each DSA city had at least one respondent the survey received 100% coverage.

Question No. 2: *Indicate your years of experience with your city's downtown.* The average number of years per respondent is 11.8. This indicates that respondents should have a good understanding of downtown housing issues.

Question No. 3: *Indicate the degree to which certain factors encourage the growth of multi-unit housing in your downtown* (percentages reflect selection frequency of that response by factor):

ENCOURAGING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
AVAILABLE PROPERTIES	37.5%	**43.8%**	12.5%	**6.2%**	3.1	3
HIGH ACTIVITY LEVEL	**68.8%**	18.7%	12.5%	**0.0%**	**3.6**	**1**
ROBUST EMPLOYMENT	**37.5%**	31.2%	25.0%	**6.3%**	3.0	5
GOOD QUALITY OF LIFE	**50.0%**	37.5%	12.5%	**0.0%**	3.3	2
ENGAGED CITY GOVERNMENT	18.8%	**62.5%**	12.5%	**6.2%**	2.9	6
STRONG HOUSING MARKET	**43.8%**	25.0%	25.0%	**6.2%**	3.1	4
PROXIMITY TO WORK/SCHOOL	25.0%	**37.5%**	18.8%	**18.7%**	**2.7**	**7**

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most encouraging factor
*Lowest average score = bottom ranking = least encouraging factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that a High Activity Level and a Good Quality of Life are the primary factors encouraging multi-unit housing downtown, while Proximity to Work/School and an Engaged City have the least impact.

Question No. 4: *Indicate the degree to which certain factors discourage the growth of multi-unit housing in your downtown* (percentages reflect selection frequency of that response by factor):

DISCOURAGING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
FEW AVAILABLE PROPERTIES	**18.8%**	25.0%	**31.2%**	25.0%	2.4	3
LOW ACTIVITY LEVEL	**6.2%**	18.8%	**43.8%**	31.2%	2.0	7
STRUGGLING EMPLOYMENT	18.8%	**43.7%**	25.0%	**12.5%**	2.7	2
POOR QUALITY OF LIFE	**12.5%**	**12.5%**	**43.8%**	31.2%	2.1	6
DISENGAGED CITY GOVERNMENT	**0.0%**	18.8%	18.7%	**62.5%**	**1.6**	**8**
WEAK HOUSING MARKET	25.0%	**50.0%**	**12.5%**	**12.5%**	**2.9**	**1**
INADEQUATE PARKING OPTIONS	**6.2%**	31.2%	**43.8%**	18.8%	2.3	4
NO QUALIFIED DEVELOPERS	**12.5%**	25.0%	25.0%	**37.5%**	2.1	5

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most discouraging factor
*Lowest average score = bottom ranking = least discouraging factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that a Weak Housing Market and Struggling Employment are the primary factors discouraging multi-unit housing downtown, while a Disengaged City and a Low Activity Level have the least impact.

Question No. 5: *Indicate the degree to which certain factors motivate people to live in your downtown* (percentages reflect selection frequency of that response by factor):

MOTIVATING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
ENTERTAINMENT/ACTIVITIES	**68.8%**	12.5%	18.8%	**0.0%**	**3.5**	**1**
USER FRIENDLY STREETSCAPES	**62.5%**	18.8%	18.7%	**0.0%**	3.4	2
PLEASANT OUTDOOR AREAS	**50.0%**	31.2%	18.8%	**0.0%**	3.3	3
UNIQUE DWELLING SPACES	**43.8%**	31.2%	25.0%	**0.0%**	3.2	4
MONETARY CITY INCENTIVES	**12.5%**	**37.5%**	31.2%	18.8%	2.4	7
PROXIMITY TO WORK/SCHOOL	12.5%	**43.8%**	37.5%	**6.2%**	2.6	6
IMPROVED SOCIAL LIFE	25.0%	**43.8%**	25.0%	**6.2%**	2.9	5
LOWER COST OF LIVING	**6.2%**	18.8%	31.2%	**43.8%**	**1.9**	**8**

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most motivating factor
*Lowest average score = bottom ranking = least motivating factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that Entertainment/Activities and User Friendly Streetscapes are the primary factors motivating people to live downtown, while Monetary City Incentives and Lower Cost of Living have the least impact.

Question No. 6: *List the most compelling reasons for living in your downtown* (write-in question; no choices given; listed by number of responses, highest on top):

- Activities and entertainment (12)
- Unique dwelling spaces and views (8)
- Proximity to work/school (6)
- User-friendly streetscapes (6)
- Public outdoor areas (5)
- Personal safety and cleanliness (4)
- Affordable housing costs and financial incentives (4)
- Neat/cool place to live (4)
- Proximity to retail services (3)
- Job opportunities (2)
- Low-maintenance living (2)
- Good investment (1)

Respondents most frequently cite Activities and Entertainment and Unique Dwelling Spaces and Views as the most compelling reasons for living in their downtown.

Question No. 7: *Indicate retail services not presently in your downtown* (listed by percentage of responses, highest on top):

- Supermarket (81.3%)
- Hardware/home improvement store (68.8%)
- Video store or bookstore (62.5%)
- Cleaners/laundry (43.8%)
- Pharmacy (37.5%)
- Gas station/care care (25.0%)
- Barber shop/salon (12.5%)
- Coffee shop (6.3%)

Follow-up question: *Indicate the degree to which the above missing retail services discourage multi-unit housing in your downtown* (percent responding in brackets):

A lot (25.0%) Some (43.8%) A little (25.5%) None (6.2%)

- Average response: Some

Respondents most frequently cite Supermarkets and Home Improvement Stores as the primary missing retail services in their downtown. Of respondents surveyed, 68.8% believe missing retail services discourage multi-unit housing in their downtown A lot or Some.

Question No. 8: *Indicate major entertainment venues presently in your downtown* (listed by percentage of responses, highest on top):

- Performing arts center/theater (75.0%)
- Large outdoor public plaza (68.8%)
- Sports arena/stadium (62.5%)
- Museum (62.5%)
- Civic auditorium (50.0%)
- Movie theater (37.5%)
- Planetarium (25.0%)
- Shopping mall (12.5%)

Follow-up question: *Indicate the degree to which the above venues encourage multi-unit housing in your downtown* (percent responding in brackets):

A lot (43.8%)　　Some (43.8%)　　A little (6.2%)　　None (6.2%)

- Average response: Between A lot and Some

Respondents most frequently cite Performing Arts Centers/Theaters and Outdoor Plazas as the major entertainment venues in their downtown. The survey indicates that 87.6% of respondents believe major entertainment venues encourage multi-unit housing downtown A lot or Some.

Question No. 9: *Indicate the degree to which downtown housing has positively impacted businesses in your downtown* (percent responding in brackets):

A lot (43.8%)　　Some (37.5%)　　A little (12.5%)　　None (6.2%)

- Average response: Some

Follow-up question: *If you answered A lot or Some above, briefly explain why* (write-in question; no choices given):

- Constant audience creates more foot traffic/demand for downtown businesses
- Downtown residents support businesses beyond 8 a.m. to 5 p.m., stores remain open longer hours
- Out-of-town visitors provide more business support than downtown residents (Ann Arbor)
- Spiral effect: more downtown residents generate more downtown businesses, more downtown businesses generate more downtown residents

- Increase in downtown businesses sends positive message to businesses outside downtown who might relocate
- Increased foot traffic make streets livelier and safer, and more viable for businesses
- Restaurants are the biggest recipients of downtown resident support
- Closer linkage between residential and retail encourages both to grow
- Downtown residents look for things to do, creates opportunities for businesses

Of respondents surveyed, 81.3% believe downtown housing positively impacts downtown businesses A lot or Some.

Question No. 10: *List the most effective way your city could attract/ encourage multi-unit housing to your downtown* (write-in question; no choices given; listed by number of responses, largest on top):

- Provide financial assistance and incentives (13)
- Work closely with developers (non-financial aide) (6)
- Revise zoning code to be more downtown-friendly (5)
- Promote downtown qualities and specific housing properties (5)
- Conduct research studies (economic and housing) (3)
- Perform infrastructure improvements and demolition activities (3)
- Assist with parking options (3)
- Create historic districts (1)

Respondents most frequently cite Financial Assistance and Incentives and Work Closely With Developers as the most effective ways to attract multi-unit housing to their downtown.

Question No. 11: *List the most important thing your city could be doing (but is not doing) to attract multi-unit housing to your downtown* (write-in question; no choices given):

- Provide financial assistance and incentives to developers and residents
- Increase retail base
- Attract various types of housing (price points, styles, and tenure)
- Promote downtown attributes and qualities (locally and regionally)
- Conduct research studies (economic and housing)
- Improve multi-unit housing image (not just for lower income people)
- Create housing coalitions

Question No. 12: *List the most common reasons for poorly performing multi-unit housing in your downtown* (write-in question; no choices given):

- Poor design, amenities package, or construction quality
- Lack of parking
- Lack of market research, poor knowledge of local market
- Lack of downtown activities
- Prices too high, need a variety of price points
- Students overtake housing, driving away non-student residents
- Poor property management
- Poor timing of new properties coming on-line (too many/too few)
- Poor location
- Bad local economy
- Unattractive/undesirable downtown environment
- Lack of retail services
- Prospective buyers cannot sell their homes
- Image that multi-unit downtown housing is usually subsidized

Question No. 13: *Indicate how many qualified developers are in your area that can deliver downtown multi-unit housing* (percent responding in brackets):

A lot (18.8%) Some (37.5%) A few (43.7%) None (0.0%)

- Average response: Some

Of respondents surveyed, 81.2% believe there are Some or A few qualified developers within their area to deliver multi-unit housing downtown.

Question No. 14: *Indicate if your city controls downtown buildings and/or sites that are good candidates for multi-unit housing* (percent responding in brackets):

Yes (62.5%) No (37.5%)

Follow-up question: *If Yes above, indicate the degree to which your city markets or advances the development of these properties*:

A lot (30.0%) Some (50.0%) A little (20.0%) None (0.0%)

- Average response: Some

Nearly two-thirds of respondents believe their city controls downtown buildings and/or sites that are good candidates for multi-unit housing and that 80% of these properties are being advanced A lot or Some.

<u>Question No. 15</u>: *Indicate how often your city uses Requests For Proposals (RFPs) to deliver multi-unit housing in your downtown* (percent responding in brackets):

Always (0.0%)   Sometimes (31.3%)   Rarely (56.2%)   Never (37.5%)

- Average response: Rarely

Of respondents surveyed, 93.5% believe their city Rarely or Never uses RFPs to deliver multi-unit housing downtown.

<u>Question No. 16</u>: *Indicate the degree to which your city pursues multi-unit housing in your downtown* (percent responding in brackets):

A lot (37.5%)   Some (50.0%)   A little (12.5%)   None (0.0%)

- Average response: Between A lot and Some

Of respondents surveyed, 87.5% believe their city pursues downtown multi-unit housing A lot or Some.

<u>Question No. 17</u>: *Indicate your city's general attitude about pursuing downtown housing* (percent responding in brackets):

- Do everything possible (including financial assistance) (53.1%)
- Promote, encourage, and facilitate (no financial assistance) (40.6%)
- Do nothing (do not need to or have not tried) (6.3%)

Most respondents believe their city's attitude is to Do Everything Possible to pursue downtown housing. Of respondents surveyed, 93.7% believe their city at a minimum promotes, encourages, and facilitates downtown housing without necessarily providing financial assistance or incentives.

<u>Question No. 18</u>: *Indicate the degree to which crime and/or homelessness deters people from living in your downtown* (percent responding in brackets):

A lot (18.8%)   Some (18.8%)   A little (31.2%)   None (31.2%)

- Average response: Between Some and A little

Over one-third of respondents believe crime and/or homelessness deters people from living in their downtown A lot or Some (Pontiac, Lansing, Saginaw, Kalamazoo, Grand Rapids, and Flint; larger cities). Nearly one-third believes it has no effect on peoples' decisions to live downtown (Midland, Bay City, Ferndale, Holland, and Port Huron; smaller cities).

Question No. 19: *List one thing you would change about your downtown to increase the number of people living there* (write-in question; no choices given; responses by city):

- More market-rate housing (Jackson)
- Lower taxes (Kalamazoo)
- More jobs and better parking (Ann Arbor)
- More activities and better public safety (Lansing)
- Better public safety (Saginaw)
- More jobs and retail businesses (Muskegon)
- More high-end restaurants (East Lansing)
- Attract supermarket and movie theater (Battle Creek)
- More housing units (Midland)
- More mixed-used projects to increase daytime population (Ferndale)
- More city incentives for mid-priced housing (Bay City)
- Change perception of unsafe/unclean downtown (Pontiac)
- More jobs (Flint)
- No response (Holland and Grand Rapids)

Question No. 20: *Indicate if a demand for multi-unit housing has been identified in your downtown recently by a professional market study* (percent responding in brackets):

Yes (81.3%) No (18.7%)

Follow-up question: *If Yes above, indicate the strength of the downtown housing demand according to the study* (percent responding in brackets):

Strong (33.3%) Moderate (58.3%) Weak (8.4%) None (0.0%)

- Average response: Between Strong and Moderate

Follow-up question: *If No above, do you believe there is a demand* (percent responding in brackets):

Yes (33.3%) No (66.7%)

Over 80% of respondents state that their city has recently identified a demand for downtown housing via a professional market study, and 91.6% of those respondents say the study indicates a Strong or Moderate demand. Of the nearly 20% of respondents whose city has not performed a study, one-third believe there is a demand and two-thirds believe there is not.

Question No. 21: *List the state program that has helped your city the most to deliver multi-unit housing in your downtown* (write-in question; no choices given; listed by number of responses, largest on top):

- Brownfield Tax Credits (7)
- Neighborhood Enterprise Zones (3)
- Low-Income Housing Tax Credits (3)
- Renaissance Zones (3)
- Downtown Development Authority TIFs (2)
- ITEA Streetscape Grants (2)
- Planning and Zoning Act/PUD Act (1)
- Occupied Property Rehabilitation Act (1)
- Historic Districts (1)
- Historic Preservation Tax Credits (1)
- Cool Cities (1)
- Core Community (1)

Question No. 22: *List the state program that has helped your city the least to deliver multi-unit housing in your downtown* (write-in question; no choices given; listed by number of responses, most on top):

- MSHDA Rental Rehabilitation Program (2)
- State CDBG/HOME/HRF Programs (1)
- Historic Preservation Tax Credits (1)
- Tax incentives (1)
- Cool Cities (not enough money per project) (1)
- Tax Exempt Bond Financing (1)

Question No. 23: *Indicate the degree to which state assistance is needed by your city to advance multi-unit housing in your downtown* (percent responding in brackets):

A lot (64.3%) Some (35.7%) A little (0.0%) None (0.0%)

- Average response: Between A lot and Some

All respondents believe that their city needs A lot or Some state assistance to advance multi-unit housing in their downtown.

Question No. 24: *List one new way that the state can help your city encourage/foster multi-unit housing in your downtown* (write-in question; no choices given):

- Give incentives to downtown residents, not just developers
- Provide money for local research studies (economic and housing)
- Allow new and longer Renaissance Zones
- Permit inclusionary zoning codes
- Provide financing for mixed-use downtown projects
- Change MSHDA program rules
- Give incentives to any downtown redevelopment project
- Provide funding to solve accessibility issues in redevelopment projects
- Quicken state approvals
- Offer more site assessment funding (MDEQ)
- Help deliver affordable housing for people making the median income
- Provide state income tax relief for residents within DDA boundaries
- Expand current programs, work with interested developers, and conduct downtown resident focus groups
- Provide technical training for downtown housing to local cities
- Provide cities with financial rewards for every unit delivered within DDA boundaries (revenue-sharing dollars per unit per year)

Question No. 25: *Indicate if you would participate in a follow-up phone interview.* All cities agreed to participate in a follow-up phone interview.

2. OWNER/DEVELOPER SURVEY

A 27-question survey was sent to developers and owners of multi-unit rental and condominium housing within the study's DSAs. Names and addresses of real estate companies were secured through fieldwork, public records, and the Internet. Of the 104 multi-unit housing properties identified within the DSAs, surveys were mailed to 40 condominium developers and 40 rental owners. Of these 80 mailed surveys, 56 were not returned, 10 were returned unopened, and 14 were completed and returned (eight condominium developers and six rental owners). This represents a response rate of 17.5%. There are 20 close-ended questions and seven open-ended questions in the survey. The results of the owner/developer survey are summarized below:

Question No. 1: *Indicate the year your company became involved in multi-unit downtown housing in Michigan.* The average number of years per respondent is 7.1. Of the 14 respondents, two started in the 1980s, three started in the 1990s, and nine started in the 2000s. This indicates that respondents should have a good understanding of downtown housing issues.

<u>Question No. 2</u>: *Indicate the Michigan cities in which your company has been involved in downtown housing*. Cities listed include: Ann Arbor, Bay City, Grand Rapids, Holland, Jackson, Lansing, Muskegon, Pontiac, and Port Huron. This represents nine of 16 DSAs, or 56.3% of all DSAs.

<u>Question No. 3</u>: *Indicate the number of properties in which your company has been involved in Michigan cities*. The average number of properties per respondent is 13.7, with a median value between one and two properties. This indicates that respondents either have many or few properties.

<u>Question No. 4</u>: *Indicate the degree to which certain factors encourage your company to do multi-unit housing in downtown areas* (percentages reflect selection frequency of that response by factor):

ENCOURAGING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
AVAILABLE PROPERTIES	**38.4%**	30.8%	30.8%	**0.0%**	3.1	2
HIGH ACTIVITY LEVEL	**15.4%**	**38.4%**	30.8%	**15.4%**	2.5	4
ROBUST EMPLOYMENT	**7.7%**	**7.7%**	15.4%	**69.2%**	**1.5**	**6**
GOOD QUALITY OF LIFE	**58.4%**	**8.3%**	25.0%	**8.3%**	**3.2**	**1**
ENGAGED CITY GOVERNMENT	23.1%	**46.1%**	23.1%	**7.7%**	2.8	3
STRONG HOUSING MARKET	**23.1%**	**23.1%**	**30.7%**	**23.1%**	2.5	5

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most encouraging factor
*Lowest average score = bottom ranking = least encouraging factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that a Good Quality of Life and Available Properties are the primary factors encouraging them to do multi-unit housing in downtowns, while Robust Employment and a Strong Housing Market have the least impact.

<u>Question No. 5</u>: *Indicate the degree to which certain factors discourage your company from doing multi-unit housing in downtown areas* (percentages reflect selection frequency of that response by factor):

DISCOURAGING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
FEW AVAILABLE PROPERTIES	21.4%	28.6%	**0.0%**	**50.0%**	2.2	T4
LOW ACTIVITY LEVEL	28.6%	**7.1%**	21.4%	**42.9%**	2.2	T4
STRUGGLING EMPLOYMENT	**71.4%**	**0.0%**	14.3%	14.3%	3.3	2
POOR QUALITY OF LIFE	21.4%	**0.0%**	21.4%	**57.2%**	**1.9**	**7**
DISENGAGED CITY GOVERNMENT	21.4%	14.3%	**7.1%**	**57.2%**	2.0	6
WEAK HOUSING MARKET	**78.5%**	**0.0%**	7.1%	21.4%	**3.4**	**1**
INADEQUATE PARKING	**21.4%**	**35.6%**	**21.4%**	**35.6%**	2.3	3

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most discouraging factor
*Lowest average score = bottom ranking = least discouraging factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that a Weak Housing Market and Struggling Employment are the primary factors discouraging them from doing downtown multi-unit housing, while a Poor Quality of Life and a Disengaged City have the least impact.

Question No. 6: *Select the statement that best describes your company's experience with doing multi-unit housing in downtown areas* (percent responding in brackets):

- Working on first one – making progress (7.1%)
- Working on first one – having challenges (14.3%)
- Done at least one – performed poorly; will not do another (7.1%)
- Done at least one – performed marginally; may do another (14.3%)
- Done at least one – performed well; will do another (57.1%)

Respondents reported that 21.4% are working on their first downtown housing property, while 78.5% have done at least one. Respondents revealed that 64.2% are having or have had success, while 35.7% are having or have had little or marginal success.

Question No. 7: *List the city program that has helped your company the most to deliver downtown multi-unit housing* (write-in question; no choices given; listed by number of responses, most on top):

- None (4)
- Payment in Lieu of Taxes (P.I.L.O.T.) (2)
- Brownfield TIFs (2)
- DDA Development Support Policy (1)
- Front End Funds for Environmental Site Assessments (1)
- DDA Streetscape Program (1)
- DDA Parking Assistance (1)

Question No. 8: *List the state program that has helped your company the most to deliver multi-unit housing in your downtown* (write-in question; no choices given; listed by number of responses, largest on top):

- Brownfield TIF's/Tax Credits (6)
- Low-Income Housing Tax Credits (3)
- Neighborhood Enterprise Zones (2)
- None (2)

Question No. 9: *Indicate which development method your company prefers to use in delivering multi-unit housing in downtown areas* (percent responding in brackets):

- Reuse an existing building (46.2%)
- Build new on a cleared site (30.8%)
- Either (23.0%)

Nearly 50% more respondents would prefer to reuse on existing building than build new on a cleared site when delivering multi-unit downtown housing, while nearly a quarter of respondents would do either.

Question No. 10: *List the most common challenges your company faces when delivering multi-unit housing in downtown areas* (write-in question; no choices given; listed by number of responses, largest on top):

- Weak housing market (5)
- High development and property costs (3)
- Number and speed of approvals/permits (3)
- Complicated financing (loans, grants and tax credits) (2)
- Crime and vandalism (2)
- Lack of parking options (2)
- Structural and code issues with older buildings (2)
- Lack of local support and assistance (2)
- Lack of tax incentives (1)
- Environmental issues (1)
- Site size and configuration problems (1)
- Slow state processing (1)
- Inability to qualify for state/city programs (1)
- Lack of retail services (1)

Question No. 11: *Indicate how often your company secures a professional market study before starting a downtown housing development* (percent responding in brackets):

Always (42.9%) Sometimes (0.0%) Rarely (21.4%) Never (35.7%)

- Average response: Between Sometimes and Rarely

Over half (57.1%) of respondents Rarely or Never secure a professional market study before starting a housing development.

Question No. 12: *Indicate the smallest city population that your company will consider when choosing locations for downtown multi-unit housing* (percent responding in brackets):

10,000 (11.1%)	60,000 (0.0%)
20,000 (0.0%)	70,000 (0.0%)
30,000 (22.2%)	80,000 (0.0%)
40,000 (33.3%)	90,000 (0.0%)
50,000 (11.1%)	100,000+ (22.2%)

- Median response: 40,000 people

Two-thirds of respondents believe that the smallest city population in which they would consider doing downtown multi-unit housing is somewhere between 30,000 and 50,000.

Question No. 13: *Indicate how often your company responds to city Requests For Proposals (RFPs) when pursuing downtown multi-unit housing* (percent responding in brackets):

Always (23.1%) Sometimes (7.7%) Rarely (30.7%) Never (38.5%)

- Average response: Rarely

Over two-thirds (69.2%) of respondents Rarely or Never respond to city RFPs when pursuing downtown multi-unit housing.

Question No. 14: *Indicate if your company has converted downtown housing units from condominium to rental due to slow sales* (percent responding in brackets):

Yes (28.6%) No (71.4%)

Question No. 15: *List the most important things that owners/developers should provide in multi-unit housing properties to make them successful in downtown areas* (write-in question; no choices given; listed by number of responses, largest on top):

- Parking (close/adequate/secure) (8)
- Security (systems/surveillance/building access) (7)
- Modest pricing (4)
- Unit designs (unique/large/proper amenities) (4)
- Outdoor areas (unit and common) (3)
- Property amenities/activities (1)
- Privacy (1)
- Ample storage (1)
- In-unit laundry facilities (1)

Question No. 16: *List the most important things that cities should provide owners/developers to increase the success rate of multi-unit housing in downtown areas* (write-in question; no choices given; listed by number of responses, largest on top):

- User-friendly development processes (fast/flexible/consistent) (10)
- Financial incentives/assistance (fee waivers/grants/loans) (7)
- Tax incentives/relief (6)
- Services (public transit/trash collection/retail development) (3)
- Parking assistance (2)

Question No. 17: *Indicate how important city assistance is to the success of multi-unit housing in downtown areas* (percent responding in brackets):

Extremely (71.4%) Very (14.4%) Somewhat (7.1%) Not at all (7.1%)

- Average response: Between Extremely and Very

Of respondents surveyed, 85.8% believe city assistance is Extremely or Very important to the success of downtown housing.

Question No. 18: *Indicate how important state assistance is to the success of multi-unit housing in downtown areas* (percent responding in brackets):

Extremely (69.2%) Very (7.7%) Somewhat (15.4%) Not at all (7.7%)

- Average response: Between Extremely and Very

Of respondents surveyed, 76.9% believe state assistance is Extremely or Very important to the success of downtown housing; slightly lower than city assistance.

Question No. 19: *Indicate how important the inclusion of office and/or retail space is to the success of multi-unit housing in downtown areas* (percent responding in brackets):

Extremely (10.0%) Very (50.0%) Somewhat (30.0%) Not at all (10.0%)

- Average response: Between Very and Somewhat

Eighty percent of respondents believe commercial space in downtown housing contributes Very much or Somewhat to the success of downtown housing.

Question No. 20: *List one new way that governmental entities can help owners/developers deliver successful multi-unit housing in downtowns* (write-in question; no choices given; listed by number of responses, largest on top):

Cities:

- Pursue/implement all available programs (3)
- Parking assistance (2)
- Brownfield assistance (1)
- Promotion (downtown in general/project-specific) (1)
- Tax relief (1)
- Zoning code flexibility (1)
- Cooperative attitude (1)
- Land cost assistance (1)

The state:

- Low-Income Housing Tax Credits (2)
- More flexible OPRA program (2)
- Brownfield program (1)
- More and longer TIFs (1)
- Programs targeting market-rate housing (1)
- Programs targeting moderate-income persons (1)
- More financially rewarding programs (1)

Question No. 21: *Indicate the degree to which certain factors motivate people to live downtown* (percentages reflect selection frequency of that response by factor):

MOTIVATING FACTOR	A LOT	SOME	A LITTLE	NONE	AVERAGE SCORE*	RANK*
ENTERTAINMENT/ACTIVITIES	**85.7%**	14.3%	0.0%	**0.0%**	**3.9**	**1**
USER FRIENDLY STREETSCAPES	**50.0%**	50.0%	0.0%	**0.0%**	3.5	2
PLEASANT OUTDOOR AREAS	**50.0%**	28.6%	21.4%	**0.0%**	3.3	4
UNIQUE DWELLING SPACES	**50.0%**	42.9%	7.1%	**0.0%**	3.4	3
MONETARY CITY INCENTIVES	25.0%	**33.3%**	**16.7%**	25.0%	2.8	7
PROXIMITY TO WORK/SCHOOL	28.6%	**35.7%**	28.6%	**7.1%**	2.9	6
IMPROVED SOCIAL LIFE	**50.0%**	21.4%	28.6%	**0.0%**	3.2	5
LOWER COST OF LIVING	**0.0%**	8.3%	16.7%	**75.0%**	**1.3**	**8**

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most motivating factor
*Lowest average score = bottom ranking = least motivating factor
*Scoring: A lot = 4 / Some = 3 / A little = 2 / None = 1

On average, respondents believe that Entertainment/Activities and User Friendly Streetscapes are the primary factors motivating people to live downtown, while Lower Cost of Living and Monetary Incentives have the least impact. Other motivating factors mentioned include: cool thing to do, personal safety, and river view. Some respondents mentioned that "high property taxes and living costs" discourage people from moving downtown.

Question No. 22: *Rank order the following resident types according to how often they are seen in multi-unit downtown housing* (percentages reflect selection frequency of that response by resident type):

RESIDENT TYPE	MOST 1	2	3	4	5	LEAST 6	AVERAGE SCORE*	RANK*
SINGLE ADULT / ALONE	**64.3%**	28.6%	7.1%	**0.0%**	**0.0%**	**0.0%**	**5.6**	**1**
SINGLE ADULT / CHILDREN	**0.0%**	**0.0%**	7.7%	30.8%	23.1%	**38.5%**	2.1	T4
ROOMMATES-PARTNERS / ALONE	7.1%	28.6%	**50.0%**	**0.0%**	**0.0%**	14.3%	4.0	3
PARTNERS / CHILDREN	**0.0%**	7.7%	7.7%	15.4%	23.1%	**46.1%**	2.1	T4
MARRIED COUPLE / ALONE	30.8%	**46.2%**	15.3%	7.7%	**0.0%**	**0.0%**	5.0	2
MARRIED COUPLE / CHILDREN	**0.0%**	**0.0%**	**0.0%**	30.8%	7.7%	**61.5%**	**1.7**	**5**

Source: VWB Research Survey Results
Red value highest per resident type
Blue value lowest per resident type
*Highest average score = top ranking = most common resident type
*Lowest average score = bottom ranking = least common resident type
*Scoring (reversed): 1 (Most) = 6 / 2 = 5 / 3 = 4 / 4 = 3 / 5 = 2 / 6 (Least) = 1

On average, respondents see childless single adults and childless married couples most frequently as residents in their downtown housing properties, while married couples with children are seen least.

Question No. 23: *Rank order the following unit types according to their popularity in multi-unit downtown housing* (percentages reflect selection frequency of that response by unit type):

UNIT TYPE	MOST 1	2	3	4	LEAST 5	AVERAGE SCORE*	RANK*
STUDIO	**0.0%**	10.0%	**50.0%**	20.0%	20.0%	2.5	4
ONE-BEDROOM	**50.0%**	25.0%	25.0%	**0.0%**	**0.0%**	4.3	2
TWO-BEDROOM	30.8%	**61.5%**	7.7%	**0.0%**	**0.0%**	**5.2**	**1**
THREE-BEDROOM	**44.4%**	**0.0%**	11.2%	**44.4%**	**0.0%**	3.4	3
FOUR-BEDROOM	**0.0%**	**0.0%**	12.5%	12.5%	**75.0%**	**1.4**	**5**

Source: VWB Research Survey Results
Red value highest per unit type
Blue value lowest per unit type
*Highest average score = top ranking = most common unit type
*Lowest average score = bottom ranking = least common unit type
*Scoring (reversed): 1 (Most) = 5 / 2 = 4 / 3 = 3 / 4 = 2 / 5 (Least) = 1

On average, respondents see two-bedroom and one-bedroom units requested most frequently in their downtown housing properties, while four-bedroom and studio units are requested least.

Question No. 24A: *Indicate how important the following property amenities are to the success of multi-unit downtown housing* (percentages reflect selection frequency of that response by amenity):

PROPERTY AMENITY	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	AVERAGE SCORE*	RANK*
VISITOR PARKING	23.1%	15.4%	**61.5%**	**0.0%**	2.6	9
RESIDENT PARKING	**78.6%**	8.0%	7.1%	**0.0%**	3.7	2
ASSIGNED RESIDENT PARKING	21.4%	**50.0%**	21.4%	**7.2%**	2.9	7
COVERED RESIDENT PARKING	21.4%	**42.9%**	35.7%	**0.0%**	2.9	6
SECURED RESIDENT PARKING	**35.7%**	28.6%	**35.7%**	**0.0%**	3.0	5
POOL / WHIRLPOOL	**0.0%**	**0.0%**	14.3%	**85.7%**	**1.1**	**15**
FITNESS CENTER	**0.0%**	23.1%	23.1%	**53.8%**	1.7	13
LAUNDRY ROOM	**38.5%**	**38.5%**	15.3%	**7.7%**	3.1	4
COMMUNITY / PARTY ROOM	**0.0%**	28.6%	**35.7%**	**35.7%**	1.9	12
EXTRA RESIDENT STORAGE	21.4%	**35.7%**	**35.7%**	**7.2%**	2.7	8
ROOF TERRACE	**7.7%**	38.5%	23.1%	30.7%	2.2	11
SECURED BUILDING ENTRIES	**78.6%**	21.4%	**0.0%**	**0.0%**	**3.8**	**1**
ON-SITE MANAGEMENT	**14.3%**	21.4%	**42.9%**	21.4%	2.3	10
ELEVATOR	**57.1%**	**14.3%**	**14.3%**	**14.3%**	3.1	3
OUTDOOR PLAY AREA	**7.7%**	**7.7%**	15.4%	**69.2%**	1.5	14

Red value highest per amenity
Blue value lowest per amenity
*Highest average score = top ranking = most important amenity
*Lowest average score = bottom ranking = least important amenity
*Scoring: Extremely important = 4 / Very important = 3 / Somewhat important = 2 / Not important =1

On average, respondents believe that Secured Building Entries and Resident Parking are the most important property amenities for the success of downtown multi-unit housing, while a Pool/Whirlpool and a Outdoor Play Area are the least important.

Question No. 24B: *Indicate how important the following unit amenities are to the success of multi-unit downtown housing* (percentages reflect selection frequency of that response by amenity):

UNIT AMENITY	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	AVERAGE SCORE*	RANK*
PRIVATE OUTDOOR AREA	**35.7%**	21.4%	**14.3%**	28.6%	2.6	5
FIREPLACE	**0.0%**	**0.0%**	28.6%	**71.4%**	**1.3**	**11**
HIGH CEILINGS (OVER 8 FEET)	**7.1%**	**57.2%**	21.4%	14.3%	2.6	8
INTERNET WIRED	50.0%	**78.6%**	**7.1%**	14.3%	3.1	2
CEILING FANS	**14.3%**	**14.3%**	**35.7%**	**35.7%**	2.1	10
WASHER/DRYER HOOK-UPS	**42.9%**	35.7%	**7.1%**	14.3%	3.1	4
WASHER/DRYER MACHINES	28.6%	14.3%	**50.0%**	**7.1%**	2.6	6
SECURITY SYSTEM	**50.0%**	21.4%	21.4%	**7.2%**	3.1	3
WINDOW COVERINGS	21.4%	21.4%	**50.0%**	**7.2%**	2.6	7
OPEN FLOOR PLAN	**50.0%**	16.7%	33.3%	**0.0%**	**3.2**	**1**
EXPOSED BRICK / DUCTWORK	28.6%	**14.3%**	**35.7%**	21.4%	2.5	9

Source: VWB Research Survey Results
Red value highest per amenity
Blue value lowest per amenity
*Highest average score = top ranking = most important amenity
*Lowest average score = bottom ranking = least important amenity
*Scoring: Extremely important = 4 / Very important = 3 / Somewhat important = 2 / Not important =1

On average, respondents believe that an Open Floor Plan and Internet Wired are the most important unit amenities for the success of downtown multi-unit housing, while Fireplaces and a Ceiling Fans are the least important.

Question No. 25: *For rental owners, indicate typical vacancy rates for downtown multi-unit rental housing in Michigan* (percent responding in brackets):

Below 5% (33.3%)	5% to 9% (50.0%)	10% to 14% (0.0%)
15% to 19% (0.0%)	20% or Higher (16.7%)	

- Average response: 5% to 9%

Of respondents surveyed, 83.3% believe typical downtown rental housing vacancy rates are below 10%.

Question No. 25: *For condominium developers, indicate how actual absorption periods compare to anticipated absorption periods* (percent responding in brackets):

- Much faster than anticipated (0.0%)
- Faster than anticipated (0.0%)
- As anticipated (25.0%)
- Slower than anticipated (12.5%)
- Much slower than anticipated (62.5%)

- Average response: Between Slower and Much slower than anticipated 75.0% of respondents believe absorption periods are Slower or Much slower than what is typically anticipated.

Question No. 26: *Indicate the current strength of the downtown housing markets in the following Michigan cities* (numbers reflect responses):

DOWNTOWN HOUSING MARKET	STRONG	MODERATE	WEAK	NONE	AVERAGE SCORE*	RANK*
ANN ARBOR	2	2	1	0	3.2	T2
BATTLE CREEK	0	2	1	0	2.7	T5
BAY CITY	1	3	1	0	3.0	4
EAST LANSING	1	2	0	0	**3.3**	**1**
FERNDALE	0	0	2	0	**2.0**	**T12**
FLINT	0	0	2	0	**2.0**	**T12**
GRAND RAPIDS	2	2	1	0	3.2	T2
HOLLAND	1	3	3	0	2.7	T5
JACKSON	0	1	1	0	2.5	T9
KALAMAZOO	0	2	2	0	2.5	T9
LANSING	0	2	3	0	2.4	11
MIDLAND	0	2	1	0	2.7	T5
MUSKEGON	0	2	1	0	2.7	T5
PONTIAC	0	0	2	0	**2.0**	**T12**
PORT HURON	0	1	1	0	2.5	T9
SAGINAW	0	0	2	0	**2.0**	**T12**

Source: VWB Research Survey Results
*Highest average score = top ranking = strongest perceived market
*Lowest average score = bottom ranking = weakest perceived market
*Scoring: Strong = 4 / Moderate = 3 / Weak = 2 / None =1

Respondents perceive the strength of downtown housing markets as follows (strong on top; weak on bottom):

- **East Lansing** (strong to moderate)
- **Ann Arbor** (strong to moderate)
- **Grand Rapids** (strong to moderate)
- Bay City (moderate)
- Battle Creek (moderate to weak)
- Midland (moderate to weak)
- Muskegon (moderate to weak)
- Holland (moderate to weak)
- Jackson (moderate to weak)
- Kalamazoo (moderate to weak)
- Port Huron (moderate to weak)
- Lansing (moderate to weak)
- **Ferndale** (weak)
- **Flint** (weak)
- **Pontiac** (weak)
- **Saginaw** (weak)

Question No. 27: *Indicate if you would participate in a follow-up phone interview* (percent responding in brackets):

Yes (78.6%) No (21.4%)

3. RESIDENT SURVEY

A 38-question survey was administered to residents of multi-unit housing within the study's DSAs. Housing properties included with this study were the source for resident participants. If a DSA did not have surveyed multi-unit housing or if a property address schemes could not be secured, they was not represented in the survey. Unit addresses were secured from fieldwork, public records, and the Internet. Envelopes with a cover letter and survey were mailed to "Current Resident" at each identified address. Residents were given the option of completing the survey electronically on-line or via the copy in their envelope. Of those responding, 13.2% used the computer, while 86.8% used the U.S. Postal Service.

Of the 2,154 envelopes mailed, 1,388 (64.4%) went to condominium units and 766 (35.6%) went to rental units in a total of 38 multi-unit housing properties (30 condo and eight rental). Surveys were sent to residents in 12 of the 16 DSA cities. Surveys could not be sent to DSA residents in Saginaw, Midland, East Lansing, and Pontiac. Of the 2,154 surveys sent, 1,455 (67.5%) were not completed, 321 (14.9%) were returned unopened (undeliverable addresses or vacant units), and 378 (17.5%) were completed and received. If the returned/unopened envelopes are deducted from the total number sent, the survey enjoyed a very good 20.6% response rate (378 of 1,833).

Of the 378 respondents, 242 (64.0%) were owners, 127 (33.6%) were renters, and nine (2.4%) did not declare their tenure. Responses were received from 12 DSAs. Less than 10 responses were received from DSAs in Battle Creek, Ferndale, Flint, and Jackson. Thus, eight or half of the DSAs in this study have 12 or more responses. With little or no representation from half of the DSAs, caution should be used in the application of the results. The intent of the survey was to secure sufficient information to develop general resident profiles and assess their attitudes toward their domiciles and downtowns.

There are 20 close-ended questions and seven open-ended questions in the survey. The instrument is divided into four sections: (1) About You, (2) About Your Prior Residence, (3) About Your Current Residence, and (4) About Your Downtown.

The aggregate results of the resident survey are summarized below.

About You

This section of the survey contains 12 questions (numbers one through 12), and is designed to elicit personal information on residents. Noteworthy results follow:

- The DSAs in Grand Rapids, Ann Arbor, and Kalamazoo provided 72.5% of all respondents. Thus, aggregate results are skewed toward these three downtowns and their residents. No data was received from Midland, Saginaw, East Lansing, or Pontiac.

- Reported gender indicates 48.0% of respondents are male and 52.0% are female. This is very close to the statewide demographic values (49.2% and 50.8%), but different from the aggregate DSA demographic averages (52.7% and 47.3%). Of the responding residents, more are female than male, whereas the DSA demographics indicate the opposite.

- Reported age indicates there are slightly more respondents in the below 34 group than the above 55 group (39.6% versus 37.8%), although they are very close. Only 22.6% of respondents fall between 35 and 54 years of age. The age group with the most respondents is 25 to 34 at 25.0%. When compared to statewide and aggregate DSA demographic values, the survey yields more young people and seniors.

- Reported household status indicates 52.9% of respondents live alone, 31.7% live with a spouse, and 15.4% live with roommates, partners or family members. There are no children in 95.2% of respondent households, and the average size is 1.6 members (93.3% of respondent households have only one or two members).

- Reported household income indicates the interpolated median value for respondent household gross annual income is $77,500. This is 54.0% more than the statewide median income, and over three times more than the aggregate DSA median income (U.S. Census). Over a third of respondent households earn less than $50,000 annually, while 21.4% make over $150,000 per year.

- Reported education level indicates 69.5% of respondents have a bachelor's degree or more, while 7.5% stopped their formal education after graduating from high school. The bachelor's degree or more percentage is significantly higher than statewide or aggregate DSA values (25.9% and 29.1%).

- Reported employment status signifies 55.1% of respondents are employed full-time, 12.4% are employed part-time, and 32.6% are not employed at all (either retired, 29.6%, or unemployed, 3.0%). Of the employed respondents, 37.5% work downtown or at home, while 62.5% work outside the downtown area. This indicates that proximity to work may not be the only reason for living downtown. Of the employed respondents, 71.8% are in the Services industry. No other employment industry comes close.

- Of all resident respondents, 18.0% are students enrolled in higher education. This compares closely to the Claritas, Inc. 2007 estimate that 20.1% of all DSA households are students. According to Claritas, Inc., the top five DSAs with the highest share of student households are: East Lansing (80.3%), Ann Arbor (44.0%), Flint (33.6%), Lansing (32.9%), and Kalamazoo (25.2%).

About Your Prior Residence

This section of the survey contains six questions (numbers 13 through 18), and is designed to elicit information on the prior living arrangements of residents. Noteworthy results follow:

- Prior to their current residence, 50.4% of respondents owned a home, 43.2% rented an apartment, and 6.4% lived with family. Tenure changes between prior and current residences are discussed in the next section of the survey.

- Prior to their current residence, 81.7% of respondents lived outside of downtown. Only 18.3% moved from within their downtown. Moreover, 52.4% of respondents moved to downtown from outside the city limits, and 18.5% emigrated from outside the state of Michigan.

- Of those respondents who owned their prior residence before moving downtown, 41.6% sold it for under $200,000, 40.0% sold it for $200,000 to $499,999, and 10.7% sold it for $500,000 or more. The price category with the most responses is $100,000 to $199,999 (30.3% of respondents). The interpolated median sale price is $241,463.

- Of those respondents who rented their prior residence before moving downtown, 17.8% paid under $500 per month, 47.3% paid between $500 and $999 per month, and 29.3% paid $1,000 or more per month. The interpolated median rent payment is $792.

- Respondents were asked to indicate the importance of certain factors in their decision to move downtown (percentages reflect selection frequency of that response by factor):

FACTOR	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	AVERAGE SCORE*	RANK*
PROXIMITY TO WORK / SCHOOL	**35.0%**	**18.4%**	22.1%	24.5%	2.6	8
ENTERTAINMENT VENUES	27.0%	**34.5%**	28.7%	**9.8%**	2.8	5
UNIQUE LIVING SPACES	**39.3%**	29.5%	18.2%	**13.0%**	3.0	2
FAVORABLE PRICE / RENT	26.9%	31.8%	**32.6%**	**8.7%**	2.8	6
DINING / NIGHTLIFE	28.6%	**35.4%**	25.9%	**10.1%**	2.8	4
IMPROVED SOCIAL LIFE	20.7%	**31.8%**	30.1%	**17.4%**	2.6	9
PERSONAL SAFETY / SECURITY	**35.1%**	**35.1%**	23.3%	**6.5%**	**3.0**	**1**
LESS AUTOMOBILE USE	26.1%	**22.5%**	**26.7%**	24.7%	2.5	10
HIGH LEVEL OF ACTIVITY	28.5%	**37.3%**	25.9%	**8.3%**	2.9	3
PUBLIC OUTDOOR SPACES	**18.9%**	26.7%	**32.9%**	21.5%	2.4	11
JOB AVAILABILITY	**8.6%**	10.8%	20.6%	**60.0%**	**1.7**	**13**
RETAIL SERVICES	**11.8%**	24.1%	**42.4%**	21.8%	2.3	12
PLEASANT STREETSCAPES	26.2%	**37.3%**	21.9%	**14.6%**	2.8	7

Source: VWB Research Survey Results
Red value highest per factor
Blue value lowest per factor
*Highest average score = top ranking = most important factor
*Lowest average score = bottom ranking = least important factor
*Scoring: Extremely important = 4 / Very important = 3 / Somewhat important = 2 / Not important =1

On average, respondents believe that Personal Safety/Security and Unique Living Spaces were the most important factors in their decision to move downtown, while Job Availability and Retail Services were the least important. Other mentioned factors include: waterfront living, tax incentives, good investment, reduced maintenance, stopping suburban sprawl, and convenient parking.

- When asked to cite the primary reason for their move to downtown, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

  - Proximity to work/school (97)
  - High level of activity (50)
  - Live in a unique building (47)
  - Reduced housing maintenance (23)
  - Tax incentives (20)
  - Favorable price/rent (20)
  - Better social life (15)
  - Convenience to entertainment (15)
  - Convenience to dining/nightlife (14)
  - Less reliance on automobile (11)
  - User-friendly streetscapes (7)
  - Convenience to retail services (7)

- Access to public outdoor spaces (6)
- Personal safety/security (6)
- Views (5)

Other mentioned reasons for moving downtown include: to enjoy an improved downtown, to retire in my native city, to simplify my lifestyle, and to obtain one-story living.

It is interesting to note that the most cited reason for moving downtown (proximity to work and school) only ranks 8th out of 13 in the previous question about the importance of certain factors in the decision to move downtown. One explanation is that people say one thing and do another. Although respondents say they want safe, unique places to live with lots of things to do, it is the desire to be close to work and school that convinces them to move downtown.

About Your Current Residence

This section of the survey contains 14 questions (numbers 19 through 32), and is designed to elicit information on the present living arrangements of residents. Noteworthy results follow:

- At the time of the survey, 65.6% of respondents owned their residence and 34.4% rented their residence. Ownership increased 28.7% between prior residences and current residences, non-ownership (renting and living with family members) decreased 31.4% between prior residences and current residences, and renting decreased 21.1% between prior residences and current residences.

- Of respondents surveyed, 71.4% say that they had Some or A few choices in their price range when they pursued their current residence.

- One-half of the respondents indicate that they have lived in their current residence between one and five years. One in three respondents have lived in their current residence for under a year. Only 17.3% have lived in their current residences for more than five years. The interpolated median value of current residence length is 2.6 years. This relatively short residency period is explainable by either a transient population, or the recent introduction of new housing.

- Slightly over half of respondents' properties have retail and/or office space in them. Of those respondents that have commercial space in their properties, 42.6% say they patronize them.

- Reported unit size and configuration indicate that 83.4% of all responding downtown residents live in a one- or two-bedroom unit (one-bedrooms slightly outnumber two-bedrooms; 42.5% versus 40.9%). Three-bedroom units outnumber studios (10.2% versus 4.6%), while studios outnumber four-bedroom units (4.6% versus 1.9%). One and two bathrooms are most common (47.4% and 34.7%), while 11.3% of units have more than two bathrooms. There are no shared bathroom facilities.

- Of those respondents who own their current residence, 44.3% paid below $200,000, 51.4% paid between $200,000 and $499,999, and 6.8% paid $500,000 or more. The price category with the most responses is $100,000 to $199,999 (41.8% of respondents). The interpolated median purchase price for current residences is $223,333. This is 7.5% lower than the prior residence median sale price.

- Of those respondents who rent their current residence, 11.5% pay under $500 per month, 48.5% pay between $500 and $999 per month, and 40.0% pay $1,000 or more per month. The interpolated median rental payment for current residences is $878. This is 10.9% higher than the prior residence median rental payment.

- Respondents were asked to indicate the importance of certain unit amenities in downtown housing (percentages reflect selection frequency of that response by amenity):

UNIT AMENITY	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	AVERAGE SCORE*	RANK*
PRIVATE OUTDOOR AREA	**20.5%**	23.1%	**30.2%**	26.2%	2.4	7
FIREPLACE	**5.5%**	10.4%	26.7%	**57.4%**	**1.6**	**11**
HIGH CEILINGS (OVER 8 FEET)	**16.7%**	**31.9%**	29.4%	22.0%	2.4	6
CEILING FANS	**5.8%**	13.3%	28.7%	**52.2%**	1.7	10
WASHER/DRYER HOOK-UPS	**28.5%**	27.2%	24.1%	**20.2%**	2.6	5
WASHER/DRYER MACHINES	**34.7%**	30.1%	19.5%	**15.7%**	2.8	3
SECURITY SYSTEM	33.2%	**35.7%**	21.2%	**9.9%**	**2.9**	**1**
WINDOW COVERINGS	**16.4%**	26.1%	26.7%	**30.8%**	2.3	9
INTERNET WIRED	**34.1%**	23.0%	24.4%	**17.7%**	2.7	4
OPEN FLOOR PLAN	29.2%	**38.7%**	21.1%	**11.0%**	2.9	2
EXPOSED BRICK / DUCTWORK	22.1%	21.1%	**19.6%**	**37.2%**	2.3	8

Source: VWB Research Survey Results
Red value highest per amenity
Blue value lowest per amenity
*Highest average score = top ranking = most important amenity
*Lowest average score = bottom ranking = least important amenity
*Scoring: Extremely important = 4 / Very important = 3 / Somewhat important = 2 / Not important =1

On average, respondents believe that a Security System and Open Floor Plan are the most important unit amenities for downtown multi-unit housing, while a Fireplace and Ceiling Fans are the least important.

- When asked to cite the most important unit amenity for downtown housing, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

  - Security system (76)
  - Open floor plan (54)
  - Washer/dryer machines (44)
  - Internet-wired (30)
  - Private outdoor area (24)
  - Exposed brick/duct work (24)
  - Washer/dryer hook-ups (20)
  - High ceilings (19)
  - Window coverings (6)
  - Fireplace (3)
  - View (2)

  Other mentioned unit amenities of importance include: barrier-free access, attached garage, and historic building.

- Respondents were asked to indicate the importance of certain common area amenities in downtown housing (percentages reflect selection frequency of that response by amenity):

COMMON AREA AMENITY	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	AVERAGE SCORE*	RANK*
VISITOR PARKING	25.6%	**37.2%**	28.7%	**8.5%**	2.8	5
ASSIGNED RESIDENT PARKING	**50.3%**	26.3%	16.1%	**7.3%**	3.2	2
COVERED / SECURED PARKING	**47.9%**	30.1%	14.1%	**7.9%**	3.2	3
LAUNDRY ROOM	**31.7%**	21.4%	**15.5%**	31.4%	2.5	7
POOL / WHIRPOOL	**11.1%**	15.8%	21.6%	**51.5%**	1.9	11
FITNESS CENTER	**18.0%**	19.4%	29.3%	**33.3%**	2.2	9
COMMUNITY / PARTY ROOM	**9.9%**	20.6%	24.9%	**44.6%**	2.0	10
AMPLE STORAGE	**20.2%**	27.3%	23.1%	**29.4%**	2.4	8
SECURED BUILDING ENTRIES	**56.9%**	28.0%	12.1%	**3.0%**	**3.4**	**1**
ON-SITE MANAGEMENT	**28.9%**	28.6%	**20.8%**	21.7%	2.7	6
ELEVATOR	**52.0%**	21.4%	**13.3%**	**13.3%**	3.1	4
OUTDOOR PLAY AREA	**4.0%**	12.6%	20.9%	**62.5%**	**1.6**	**12**

Source: VWB Research Survey Results
Red value highest per amenity
Blue value lowest per amenity
*Highest average score = top ranking = most important amenity
*Lowest average score = bottom ranking = least important amenity
*Scoring: Extremely important = 4 / Very important = 3 / Somewhat important = 2 / Not important =1

On average, respondents believe that Secured Building Entries and Assigned Resident Parking are the most important common area amenities for downtown multi-unit housing, while an Outdoor Play Area and a Pool/Whirlpool are the least important.

- When asked to cite the most important common area amenity for downtown housing, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

    - Covered/secured parking (84)
    - Secured building entries (80)
    - Assigned resident parking (59)
    - Elevator (27)
    - Fitness center (16)
    - Laundry room (12)
    - Pool/whirlpool (11)
    - On-site management (10)
    - Ample storage (9)
    - Community/party room (6)
    - Visitor parking (4)
    - Outdoor play area (1)

    Other mentioned common area amenities of importance include: barrier-free access, restaurant/bar, and attached garages.

- When asked to cite what they like best about their current residence, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

    - Good location/convenient to work or school/walkable to neighborhood services (161)
    - Unique building/living space (61)
    - Good unit size/design/amenities (52)
    - Great view (43)
    - Pleasant neighbors/good social life (32)
    - Security (14)
    - Access to waterfront and public outdoor spaces (14)
    - Quiet/peaceful (13)
    - Good on-site management (13)
    - Low-maintenance living (10)
    - Tax incentives/reasonable price or rent (9)
    - Modern/new unit (6)
    - Parking garage (6)
    - Solid/high-quality construction (5)
    - Private outdoor area off dwelling unit (5)
    - Barrier-free living (5)

- When asked to cite what they like least about their current residence, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

    - Parking problems (58)
    - Noise and odor problems (55)
    - Poor construction and design (29)
    - Expensive rent or high purchase price (21)
    - Lack of private outdoor area off unit (19)
    - Poor property management (19)
    - Unit too small (17)
    - High property taxes (14)
    - Homeowner association problems (12)
    - Nothing; like everything (12)
    - Neighbor problems (9)
    - Crime and homeless problems (9)
    - Lack of retail services (8)
    - Lack of storage in unit (8)
    - Lack of security (7)
    - No washer/dryer in unit (6)
    - Poorly performing developer (5)
    - Long distance from unit to parking (5)
    - Condominiums being rented (5)
    - Lack of outdoor common area (4)
    - Lack of property amenities (4)
    - Lack of downtown activities (3)
    - Poor view (3)
    - Poorly operating elevators (3)

- With regard to parking needs, 55.6% of respondents say they only need one parking space, while 40.2% require two spaces. The one-space percentage corresponds closely to the 52.9% of respondents who live alone.

- When asked to indicate their level of satisfaction with their current downtown residence, 84.5% of respondents say they are Extremely or Very satisfied, while only 1.3% are completely dissatisfied. One out of three respondents is extremely satisfied.

About Your Downtown

This section of the survey contains six questions (numbers 33 through 38), and is designed to elicit information on residents' perceptions of their downtown. Noteworthy results follow:

- When asked to cite what they like best about their downtown, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):
    - Convenient to work/school and walkable to retail services (239)
    - High level of activity and entertainment (53)
    - Vibrant urban lifestyle (22)
    - Good retail/restaurant services (13)
    - Less reliance on automobiles (13)
    - Active social life (8)
    - Pleasant outdoor public spaces and waterfronts (8)
    - Solid/high-quality construction (5)
    - Good views (4)
    - Tax incentives/good investments (4)
    - Public transit (3)
    - Low-maintenance living (2)
    - Unique residence (2)
    - Low crime and homelessness/feel safe (2)

- When asked to cite what they like least about their downtown, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):
    - Lack of retail services (79; 67% mentioned grocery store)
    - Crime/homelessness/personal safety (46)
    - Parking problems (cost/availability/visitors/secured/covered) (46)
    - Noise, odors, and air pollution (39)
    - Traffic (33)
    - Nothing; like everything (25)
    - High property taxes (12)
    - Expensive rent or high purchase price (11)
    - Construction activity (6)
    - Non pedestrian-friendly streetscapes (6)
    - Lack of private outdoor space off unit (5)
    - Lack of things to do/activities (5)
    - Lack of outdoor public spaces (4)
    - Long distance from parking to unit (4)
    - Lack of social life/interaction/good neighbors (2)

- When asked to indicate their level of satisfaction with their downtown, 86.2% of respondents (that answered with opinions) say they are Extremely or Very satisfied, while less than 1.0% are completely dissatisfied. Nearly 40% of respondents are extremely satisfied.

- Residents were asked to rate the quality of their downtown on certain attributes (percentages reflect selection frequency of that response by attribute):

ATTRIBUTE	EXCELLENT	GOOD	FAIR	POOR	AVERAGE SCORE*	RANK*
PARKING / TRAFFIC FLOW	15.1%	**54.1%**	24.4%	**6.4%**	2.8	9
PERSONAL SAFETY	21.8%	**60.4%**	15.3%	**2.5%**	3.0	5
CLEANLINESS / APPEARANCE	28.5%	**57.3%**	12.3%	**1.9%**	3.1	3
EATING / DRINKING PLACES	**48.0%**	40.9%	7.6%	**3.5%**	**3.3**	**1**
RETAIL SERVICES	**9.7%**	30.6%	**34.4%**	25.3%	2.3	13
ACTIVITIES / THINGS TO DO	29.8%	**45.5%**	18.4%	**6.3%**	3.0	6
PUBLIC OUTDOOR SPACES	23.5%	**46.9%**	25.4%	**4.2%**	2.9	8
JOB MARKET	**5.7%**	23.6%	**38.0%**	32.7%	**2.0**	**14**
USER-FRIENDLY STREETS	26.6%	**49.3%**	19.3%	**4.8%**	3.0	7
PUBLIC TRANSIT SYSTEM	17.4%	**37.0%**	31.8%	**13.8%**	2.6	11
ENTERTAINMENT / SPORTS	34.1%	**44.9%**	17.9%	**3.1%**	3.1	4
PUBLIC SCHOOLS	**14.8%**	**33.8%**	30.6%	20.8%	2.4	12
HOUSING CHOICES	10.2%	**47.4%**	33.8%	**8.6%**	2.6	10
CULTURAL ARTS	**40.2%**	39.1%	16.6%	**4.1%**	3.2	2

Source: VWB Research Survey Results
Red value highest per attribute
Blue value lowest per attribute
*Highest average score = top ranking = highest rated attribute
*Lowest average score = bottom ranking = lowest rated attribute
*Scoring: Excellent = 4 / Good = 3 / Fair = 2 / Poor =1

On average, respondents believe that Eating/Drinking Places and Cultural Arts are the highest rated attributes of their downtown, while the Job Market and Retail Services are the lowest rated attributes.

- When asked why they would move from their current downtown residence, respondents list the following (write-in question; no choices given; responses have been categorized and listed by number of responses, largest on top):

    - Reduce monthly housing costs (57)
    - Get a bigger residence (48)
    - Employment change (transfer/new job/lose job) (47)
    - Death/health/frailty (40)
    - Lifestyle change (marriage/children/divorce) (39)
    - No reason to move (39)
    - Private outdoor space/yard (24)
    - High taxes (19)
    - Noise and traffic (16)
    - Crime/homelessness/personal safety (14)

- Leave Michigan/seek a better climate (13)
- Parking problems (12)
- Try a better or different city (12)
- Find a better dwelling unit or property (11)
- Stop renting and buy (10)
- Graduating from college (8)
- Bad property manager, condominium board, or developer (7)
- Seek better schools (7)
- Retire (7)
- Offered a good price for current residence (6)
- Move closer to family members (3)

Additional Resident Survey Analyses

To gain further insight into downtown resident housing attitudes and profiles, additional cross-tab analyses have been performed on survey data. Tables and noteworthy results follow:

- The following table compares the satisfaction level with current residence across various resident profile characteristics (percentages reflect selection frequency of that response by resident characteristic):

CHARACTERISTIC	EXTREMELY SATISFIED	VERY SATISFIED	SOMEWHAT SATISFIED	NOT AT ALL SATISFIED	AVERAGE SCORE*	RANK*
TENURE						
OWNERS	41.4%	**49.0%**	9.2%	**0.4%**	3.31	2
RENTERS	22.8%	**52.0%**	22.0%	**3.2%**	2.95	19
GENDER						
MALE	33.1%	**50.6%**	15.7%	**0.6%**	3.16	14
FEMALE	36.5%	**48.4%**	13.0%	**2.1%**	3.19	7
AGE						
BELOW 35 YEARS	23.5%	**58.4%**	16.8%	**1.3%**	3.04	18
35 TO 54 YEARS	31.0%	**46.4%**	21.4%	**1.2%**	3.07	16
55 & ABOVE YEARS	**47.9%**	43.6%	7.1%	**1.4%**	**3.38**	**1**
INCOME						
BELOW $50,000 / YR	30.4%	**49.6%**	16.8%	**3.2%**	3.07	17
$50,000 TO $99,999 / YR	37.9%	**49.5%**	12.6%	**0.0%**	3.25	5
$100,000 & ABOVE / YR	37.4%	**50.4%**	12.2%	**0.0%**	3.25	4
LIVING ARRANGEMENT						
ALONE	36.2%	**47.4%**	13.8%	**2.6%**	3.17	11
WITH OTHERS	32.8%	**52.5%**	14.7%	**0.0%**	3.18	10
EMPLOYMENT						
FULL-TIME	31.9%	**52.9%**	14.7%	**0.5%**	3.16	15
PART-TIME & NOT WORKING	37.0%	**46.7%**	13.9%	**2.4%**	3.18	9
STUDENT VS. NON-STUDENT						
STUDENT	15.9%	**61.9%**	19.0%	**3.2%**	**2.91**	**21**
NON-STUDENT	37.9%	**48.3%**	12.8%	**1.0%**	3.23	6
EDUCATION						
HIGH-SCHOOL GRADUATE	**46.4%**	35.7%	17.9%	**0.0%**	3.29	3
VO-TECH GRADUATE / SOME COLLEGE / ASSOC. DEGREE	31.8%	**54.1%**	12.9%	**1.2%**	3.17	13
BACHELOR DEGREE OR MORE	33.3%	**51.0%**	14.5%	**1.2%**	3.17	12
CHILDREN						
HOUSEHOLDS WITHOUT	35.1%	**49.9%**	13.6%	**1.4%**	3.19	8
HOUSEHOLDS WITH	22.2%	**50.0%**	27.8%	**0.0%**	2.94	20

Source: VWB Research Survey Results
Red value highest per characteristic
Blue value lowest per characteristic
*Highest average score = top ranking = most satisfied
*Lowest average score = bottom ranking = least satisfied
*Scoring: Extremely = 4 / Very = 3 / Somewhat = 2 / Not At All = 1

On average, seniors (55 years and older) and owners have the highest satisfaction level with their current downtown residence. Students and respondents with children have the lowest satisfaction level with their current residence. Other comparisons indicate that: (1) owners are more satisfied than renters, (2) older people are more satisfied than younger people, (3) higher-income people are more satisfied than lower-income people, (4) non-students are more satisfied than students, (5) less-educated people are more satisfied than higher-educated people, and (6) people living without children are more satisfied than people living with children.

- The following table compares the satisfaction level with downtown across resident profile characteristics (percentages reflect selection frequency of that response by resident characteristic):

CHARACTERISTIC	EXTREMELY SATISFIED	VERY SATISFIED	SOMEWHAT SATISFIED	NOT AT ALL SATISFIED	AVERAGE SCORE*	RANK*
TENURE						
OWNERS	**46.2%**	45.7%	8.1%	**0.0%**	3.31	2
RENTERS	26.2%	**49.2%**	23.8%	**0.8%**	2.95	20
GENDER						
MALE	36.8%	**49.4%**	13.8%	**0.0%**	3.16	14
FEMALE	41.6%	**49.3%**	13.0%	**1.1%**	3.19	8
AGE						
BELOW 35 YEARS	35.6%	**50.7%**	13.7%	**0.0%**	3.04	18
35 TO 54 YEARS	34.5%	**51.2%**	14.3%	**0.0%**	3.07	16
55 & ABOVE YEARS	**45.5%**	40.9%	12.1%	**1.5%**	**3.38**	**1**
INCOME						
BELOW $50,000 / YR	31.4%	**47.9%**	19.9%	**0.8%**	3.07	17
$50,000 TO $99,999 / YR	44.6%	**48.5%**	6.9%	**0.0%**	3.25	5
$100,000 & ABOVE / YR	42.5%	**47.5%**	10.0%	**0.0%**	3.25	6
LIVING ARRANGEMENT						
ALONE	41.2%	**46.0%**	11.8%	**1.0%**	3.17	12
WITH OTHERS	37.1%	**48.0%**	14.9%	**0.0%**	3.18	9
EMPLOYMENT						
FULL-TIME	40.5%	**49.0%**	10.5%	**0.0%**	3.16	13
PART-TIME & NOT WORKING	36.7%	**45.6%**	16.5%	**1.2%**	3.18	11
STUDENT VS. NON-STUDENT						
STUDENT	27.4%	**54.8%**	17.8%	**0.0%**	**2.91**	**21**
NON-STUDENT	41.0%	**46.6%**	12.0%	**0.4%**	3.23	7
EDUCATION						
HIGH-SCHOOL GRADUATE	**40.0%**	32.0%	24.0%	**4.0%**	3.08	15
VO-TECH GRADUATE / SOME COLLEGE / ASSOC. DEGREE	36.6%	**45.1%**	18.3%	**0.0%**	3.18	10
BACHELOR DEGREE OR MORE	39.0%	**50.2%**	10.4%	**0.4%**	3.28	3
CHILDREN						
HOUSEHOLDS WITHOUT	40.1%	**47.1%**	12.3%	**0.5%**	3.27	4
HOUSEHOLDS WITH	22.2%	**55.6%**	22.2%	**0.0%**	3.00	19

Source: VWB Research Survey Results
Red value highest per characteristic
Blue value lowest per characteristic
*Highest average score = top ranking = most satisfied
*Lowest average score = bottom ranking = least satisfied
*Scoring: Extremely = 4 / Very = 3 / Somewhat = 2 / Not At All = 1

On average, owners and seniors (55 years and older) have the highest satisfaction level with their downtown. Renters and students have the lowest satisfaction level with their downtown. All other comparisons are the same as residence satisfaction above, with the exception that higher-educated respondents are more satisfied with their downtown than less-educated respondents.

- The following table shows average satisfaction scores for residence and downtown by DSA (a DSA is included if it has 10 or more survey responses):

DOWNTOWN STUDY AREA	AVERAGE RESIDENCE SATISFACTION SCORE*	RANK**	AVERAGE DOWNTOWN SATISFACTION SCORE*	RANK**	AVERAGE COMBINED SATISFACTION SCORE*	RANK**
ANN ARBOR	3.21	5	3.44	3	3.33	3
BAY CITY	3.50	2	3.50	2	3.50	2
GRAND RAPIDS	3.12	7	3.26	5	3.19	5
HOLLAND	**3.53**	**1**	**3.58**	**1**	**3.56**	**1**
KALAMAZOO	3.31	3	3.31	4	3.31	4
LANSING	**2.42**	**8**	**2.75**	**8**	**2.59**	**8**
MUSKEGON	3.19	6	2.83	7	3.01	7
PORT HURON	3.30	4	2.84	6	3.07	6

Source: VWB Research Survey Results
*Scoring: Extremely = 4 / Very = 3 / Somewhat = 2 / Not At All =1
**Highest average score = top ranking = highest satisfaction level
**Lowest average score = bottom ranking = lowest satisfaction level

Except for Muskegon and Port Huron, DSA respondents are more satisfied with their downtowns than their residences. The Holland DSA receives the highest satisfaction levels, while the Lansing DSA receives the lowest. The Port Huron DSA has the largest difference between its residence (3.30) and downtown (2.84) satisfaction scores.

- The following six tables take resident profile characteristics (gender, age, income, education, tenure, and living arrangement) and display pertinent survey response data for comparison. Significant findings are discussed after each table. It should be noted that the 35 to 54 age cohort is excluded from the Age table, due to the low number of respondents. Similarly, the $50,000 to $99,999 income cohort is excluded from the Income table.

		GENDER	
		MALE	FEMALE
SURVEY ITEM	RESPONSES:	179	194
GENDER (PERCENT)		48.0%	52.0%
MOST COMMON AGE GROUP (PERCENT)		25 to 34 YRS. (25.7%)	65+ YRS. (25.9%)
LIVE ALONE (PERCENT)		46.4%	59.6%
CHILDLESS (PERCENT)		95.5%	94.8%
INTERPOLATED MEDIAN ANNUAL INCOME		$100,000	$57,250
BACHELOR DEGREE OR MORE (PERCENT)		77.3%	62.1%
STUDENT (PERCENT)		14.6%	21.1%
FULL-TIME EMPLOYMENT (PERCENT)		66.7%	44.5%
NOT WORKING (PERCENT)		25.5%	38.8%
WORK DOWNTOWN (PERCENT)		27.3%	35.7%
LAST MOVE FROM WITHIN CITY (PERCENT)		44.9%	50.0%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 56.2% / RENTED: 38.8%	OWNED: 45.0% / RENTED: 47.1%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $244,000 / RENT: $833	PRICE: $208,300 / RENT: $692
MOST COMMON REASON FOR MOVING DOWNTOWN		DINING / NIGHTLIFE ENTERTAINMENT	PERSONAL SAFETY UNIQUE LIVING PLACE
HOUSING CHOICES DURING LAST MOVE		SOME	SOME to FEW
OWN / RENT CURRENT RESIDENCE (PERCENTS)		OWN: 70.6% / RENT: 29.4%	OWN: 61.2% / RENT: 38.8%
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $245,500 / RENT: $963	PRICE: $198,000 / RENT: $800
INTERPOLATED YEARS AT CURRENT RESIDENCE		2.1 YRS.	2.3 YRS.
MOST COMMON NUMBER OF BEDROOMS		2	1
MOST COMMON NUMBER OF BATHROOMS		1	1
MOST IMPORTANT UNIT AMENITIES		OPEN FLOOR PLAN INTERNET-WIRED	SECURITY SYSTEM WASHER-DRYER MACHINES
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	CEILING FANS FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES ASSIGNED-COVERED PARKING	SECURED BLDG. ENTRIES ASSIGNED-COVERED PARKING
LEAST IMPORTANT PROPERTY AMENITIES		POOL / WHIRLPOOL OUTDOOR PLAY AREAS	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 49.7% 2 SPACES: 45.1%	1 SPACE: 62.1% 2 SPACES: 34.5%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES CLEANLINESS / APPEARANCE	EATING & DRINKING PLACES CULTURAL ARTS
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET PUBLIC SCHOOLS	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to male DSA respondents, female DSA respondents are concentrated in the older and younger age groups, live alone more, make less money, are less educated, are more likely to be in school, are less likely to work full-time, are more likely to work downtown, are more likely to have moved downtown from within their current city, and are more likely to rent or live with family members. Further, female DSA respondents pay less for housing, moved downtown for increased personal safety or to live in a unique dwelling, have fewer housing choices, live in smaller dwellings, and need fewer parking spaces.

Male DSA respondents are distributed more evenly across all age groups, live with spouses more, are more educated, are more likely to be employed full-time, are more likely to work outside downtown, are more likely to own their residence, and moved downtown for improved entertainment and nightlife.

		AGE	
		BELOW 35 YRS.	**55 YRS. & ABOVE**
SURVEY ITEM	**RESPONSES:**	149	142
GENDER (PERCENT)		M: 45.0% / F: 55.0%	M: 45.3% / F: 54.7%
MOST COMMON AGE GROUP (PERCENT)		-	-
LIVE ALONE (PERCENT)		60.8%	48.6%
CHILDLESS (PERCENT)		96.6%	100.0%
INTERPOLATED MEDIAN ANNUAL INCOME		$50,000	$88,900
BACHELOR DEGREE OR MORE (PERCENT)		71.9%	60.9%
STUDENT (PERCENT)		42.9%	0.0%
FULL-TIME EMPLOYMENT (PERCENT)		64.9%	28.8%
NOT WORKING (PERCENT)		19.0%	59.7%
WORK DOWNTOWN (PERCENT)		37.3%	28.6%
LAST MOVE FROM WITHIN CITY (PERCENT)		58.4%	48.5%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 11.4% / RENTED: 73.2%	OWNED: 80.6% / RENTED: 19.4%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $171,500 / RENT: $780	PRICE: $220,000 / RENT: $725
MOST COMMON REASON FOR MOVING DOWNTOWN		CLOSE TO WORK / SCHOOL PERSONAL SAFETY	USER-FRIENDLY STREETS PERSONAL SAFETY
HOUSING CHOICES DURING LAST MOVE		SOME	SOME to FEW
OWN / RENT CURRENT RESIDENCE (PERCENTS)		OWN: 70.6% / RENT: 29.4%	OWN: 75.9% / RENT: 24.1%
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $170,000 / RENT: $880	PRICE: $263,300 / RENT: $620
INTERPOLATED YEARS AT CURRENT RESIDENCE		1.0 YR.	4.2 YRS.
MOST COMMON NUMBER OF BEDROOMS		1	2
MOST COMMON NUMBER OF BATHROOMS		1	2
MOST IMPORTANT UNIT AMENITIES		INTERNET-WIRED SECURITY SYSTEM	SECURITY SYSTEM WASHER-DRYER MACHINES
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	EXPOSED BRICK / DUCTWORK FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES COVERED PARKING	SECURED BLDG. ENTRIES ELEVATORS
LEAST IMPORTANT PROPERTY AMENITIES		OUTDOOR PLAY AREA COMMUNITY-PARTY ROOM	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 66.2% 2 SPACES: 31.0%	1 SPACE: 46.9% 2 SPACES: 47.7%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES CLEANLINESS / APPEARANCE	EATING & DRINKING PLACES CULTURAL ARTS
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET PUBLIC SCHOOLS	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to young-adult DSA respondents, senior DSA respondents live with spouses more, make more money, are less educated, are more likely not working, are less likely to work downtown, are less likely to have moved downtown from within their current city, are more likely to own their residence, moved downtown for pedestrian-friendly streets or increased personal safety, have fewer housing choices, live in larger dwellings, pay more to buy and less to rent, stay in their residence longer, and need fewer parking spaces.

Young-adult DSA respondents live alone more, are more educated, are more likely to be students and employed full-time, are more likely to work downtown, are more likely to have moved downtown from within their current city, are more likely to rent or live with family members, are more transient, and moved downtown to be close to work or school or for increased personal safety.

		INCOME	
		BELOW $50,000 / YR.	**$100,000 & ABOVE / YR.**
SURVEY ITEM	**RESPONSES:**	126	124
GENDER (PERCENT)		M: 31.7% / F: 68.3%	M: 66.7% / F: 33.3%
MOST COMMON AGE GROUP (PERCENT)		<25 YRS. (30.2%)	55 to 64 YRS. (25.8%)
LIVE ALONE (PERCENT)		72.8%	28.2%
CHILDLESS (PERCENT)		93.5%	93.5%
INTERPOLATED MEDIAN ANNUAL INCOME		-	-
BACHELOR DEGREE OR MORE (PERCENT)		55.2%	83.7%
STUDENT (PERCENT)		38.1%	0.8%
FULL-TIME EMPLOYMENT (PERCENT)		34.4%	76.4%
NOT WORKING (PERCENT)		44.0%	16.3%
WORK DOWNTOWN (PERCENT)		44.1%	26.0%
LAST MOVE FROM WITHIN CITY (PERCENT)		47.2%	42.3%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 32.1% / RENTED: 55.2%	OWNED: 69.9% / RENTED: 29.3%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $138,500 / RENT: $700	PRICE: $284,000 / RENT: $1,062
MOST COMMON REASON FOR MOVING DOWNTOWN		PERSONAL SAFETY FAVORABLE PRICE-RENT	UNIQUE LIVING PLACE DINING / NIGHTLIFE
HOUSING CHOICES DURING LAST MOVE		SOME to FEW	SOME
OWN / RENT CURRENT RESIDENCE (PERCENTS)		OWN: 42.7% / RENT: 57.3%	OWN: 78.9% / RENT: 21.1%
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $164,700 / RENT: $778	PRICE: $289,000 / RENT: $1,450
INTERPOLATED YEARS AT CURRENT RESIDENCE		1.8 YRS.	2.5 YRS.
MOST COMMON NUMBER OF BEDROOMS		1	2
MOST COMMON NUMBER OF BATHROOMS		1	2
MOST IMPORTANT UNIT AMENITIES		SECURITY SYSTEM WASHER-DRYER MACHINES	SECURITY SYSTEM OPEN FLOOR PLAN
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	CEILING FANS FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES ELEVATORS	SECURED BLDG. ENTRIES ASSIGNED-COVERED PARKING
LEAST IMPORTANT PROPERTY AMENITIES		POOL / WHIRLPOOL OUTDOOR PLAY AREAS	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 75.7% 2 SPACES: 19.1%	1 SPACE: 33.1% 2 SPACES: 62.8%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES CLEANLINESS / APPEARANCE	EATING & DRINKING PLACES CLEANLINESS / APPEARANCE
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET PUBLIC SCHOOLS	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to higher-income DSA respondents, lower-income DSA respondents are more likely to be female, younger, live alone more, are less educated, are more likely to be in school, are less likely to work full-time, are more likely to work downtown, are more likely to rent, moved downtown for increased personal safety or more favorable housing costs, have fewer housing choices, live in smaller dwellings, pay less for housing, are more transient, and need fewer parking spaces.

Higher-income DSA respondents, are more likely to be male, older (55+), live with spouses more, are more educated, are more likely to work full-time or not at all, are less likely to work downtown, are more likely to own their residence, pay more for housing, moved downtown to live in a unique dwelling or for better entertainment and nightlife, live in their residence longer, and need more parking spaces.

		EDUCATION	
		HIGH SCHOOL OR SOME COLLEGE	BACHELORS DEGREE OR MORE
SURVEY ITEM	**RESPONSES:**	113	257
GENDER (PERCENTS)		M: 35.7% / F: 64.3%	M: 53.5% / F: 46.5%
MOST COMMON AGE GROUP		65+ YRS. (36.3%)	25 to 34 YRS. (32.4%)
LIVE ALONE (PERCENT)		56.3%	51.4%
CHILDLESS (PERCENT)		96.4%	94.5%
INTERPOLATED MEDIAN ANNUAL INCOME		$50,000	$85,700
BACHELOR DEGREE OR MORE (PERCENT)		-	-
STUDENT (PERCENT)		27.1%	13.8%
FULL-TIME EMPLOYMENT (PERCENT)		31.0%	65.6%
NOT WORKING (PERCENT)		52.2%	23.8%
WORK DOWNTOWN (PERCENT)		28.3%	30.9%
LAST MOVE FROM WITHIN CITY (PERCENT)		56.6%	43.7%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 46.0% / RENTED: 43.4%	OWNED: 52.0% / RENTED: 43.4%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $161,100 / RENT: $629	PRICE: $255,200 / RENT: $808
MOST COMMON REASON FOR MOVING DOWNTOWN		PERSONAL SAFETY FAVORABLE PRICE-RENT	PERSONAL SAFETY UNIQUE LIVING PLACE
HOUSING CHOICES DURING LAST MOVE		SOME	SOME
OWN / RENT CURRENT RESIDENCE (PERCENTS)		OWN: 50.0% / RENT: 50.0%	OWN: 72.2% / RENT: 27.8%
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $241,200 / RENT: $635	PRICE: $214,000 / RENT: $975
INTERPOLATED YEARS AT CURRENT RESIDENCE		2.8 YRS.	2.1 YRS.
MOST COMMON NUMBER OF BEDROOMS		2	2
MOST COMMON NUMBER OF BATHROOMS		1	1.5
MOST IMPORTANT UNIT AMENITIES		SECURITY SYSTEM WASHER-DRYER MACHINES	SECURITY SYSTEM OPEN FLOOR PLAN
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	CEILING FANS FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES ELEVATOR	SECURED BLDG. ENTRIES ASSIGNED PARKING
LEAST IMPORTANT PROPERTY AMENITIES		POOL / WHIRLPOOL OUTDOOR PLAY AREAS	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 51.5% 2 SPACES: 41.6%	1 SPACE: 57.8% 2 SPACES: 39.0%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES ENTERTAINMENT / SPORTS	EATING & DRINKING PLACES CLEANLINESS / APPEARANCE
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET RETAIL SERVICES	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to less-educated DSA respondents, higher-educated DSA respondents are more likely to be male, younger, make more money, are less likely to be in school, are more likely to work full-time, are less likely to have moved downtown from within their current city, are more likely to own their residence, moved downtown for increased personal safety or to live in a unique dwelling, pay less to buy and more to rent, and are more transient.

Less-educated DSA respondents, are more likely to be female, older (55+), make less money, are less likely to work full-time and more likely not to work at all, rent and own at even rates, pay more to buy and less to rent, moved downtown for increased personal safety or for favorable housing costs, and live in their residence longer.

		TENURE	
		OWNERS	RENTERS
SURVEY ITEM	RESPONSES:	242	127
GENDER (PERCENTS)		M: 52.1% / F: 47.9%	M: 41.6% / F: 58.4%
MOST COMMON AGE GROUP		25 to 34 YRS. (24.9%)	<25 YRS. (27.6%)
LIVE ALONE (PERCENT)		48.3%	59.5%
CHILDLESS (PERCENT)		95.8%	93.7%
INTERPOLATED MEDIAN ANNUAL INCOME		$87,200	BELOW $50,000
BACHELOR DEGREE OR MORE (PERCENT)		76.8%	56.0%
STUDENT (PERCENT)		10.9%	31.7%
FULL-TIME EMPLOYMENT (PERCENT)		61.3%	44.4%
NOT WORKING (PERCENT)		27.1%	41.9%
WORK DOWNTOWN (PERCENT)		25.6%	44.9%
LAST MOVE FROM WITHIN CITY (PERCENT)		52.1%	39.5%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 60.8% / RENTED: 35.0%	OWNED: 29.6% / RENTED: 59.2%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $233,500 / RENT: $777	PRICE: $191,000 / RENT: $750
MOST COMMON REASON FOR MOVING DOWNTOWN		UNIQUE LIVING PLACE ACTIVITIES	PERSONAL SAFETY CLOSE TO WORK/SCHOOL
HOUSING CHOICES DURING LAST MOVE		SOME	SOME TO FEW
OWN / RENT CURRENT RESIDENCE (PERCENTS)		-	-
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $220,000	RENT: $870
INTERPOLATED YEARS AT CURRENT RESIDENCE		2.6 YRS.	1.25 YRS.
MOST COMMON NUMBER OF BEDROOMS		2	1
MOST COMMON NUMBER OF BATHROOMS		2	1
MOST IMPORTANT UNIT AMENITIES		OPEN FLOOR PLAN SECURITY SYSTEM	SECURITY SYSTEM WASHER-DRYER MACHINES
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	CEILING FANS FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES COVERED PARKING	SECURED BLDG. ENTRIES ELEVATOR
LEAST IMPORTANT PROPERTY AMENITIES		POOL / WHIRLPOOL OUTDOOR PLAY AREAS	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 48.5% 2 SPACES: 47.6%	1 SPACE: 67.8% 2 SPACES: 27.1%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES CLEANLINESS / APPEARANCE	EATING & DRINKING PLACES CLEANLINESS / APPEARANCE
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET PUBLIC SCHOOLS	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to DSA respondents who own, DSA respondents who rent are more likely to be female, younger, live alone more, make less money, are less educated, are more likely to be in school, are less likely to work full-time, are more likely to work downtown, are less likely to have moved downtown from within their current city, moved downtown for increased personal safety or to be closer to work or school, have fewer housing choices, live in smaller dwellings, pay less for housing, are more transient, and need fewer parking spaces.

DSA respondents who own are more likely to be male, older, live with spouses more, are more educated, make more money, are more likely to work full-time or not at all, are less likely to work downtown, pay more for housing, moved downtown to live in a unique dwelling or to enjoy more activities, live in their residence longer, live in larger dwellings, and need more parking spaces.

SURVEY ITEM	RESPONSES:	LIVING ARRANGEMENT	
		ALONE	WITH OTHERS
		199	177
GENDER (PERCENTS)		M: 41.9% / F: 58.1%	M: 55.2% / F: 44.8%
MOST COMMON AGE GROUP		25 to 34 YRS. (30.3%)	65+ YRS. (22.0%)
LIVE ALONE (PERCENT)		-	-
CHILDLESS (PERCENT)		-	92.6%
INTERPOLATED MEDIAN ANNUAL INCOME		$51,400	$127,300
BACHELOR DEGREE OR MORE (PERCENT)		67.7%	71.8%
STUDENT (PERCENT)		21.9%	12.9%
FULL-TIME EMPLOYMENT (PERCENT)		55.6%	54.9%
NOT WORKING (PERCENT)		33.7%	30.9%
WORK DOWNTOWN (PERCENT)		31.7%	30.3%
LAST MOVE FROM WITHIN CITY (PERCENT)		48.3%	47.2%
OWNED / RENTED PRIOR RESIDENCE (PERCENTS)		OWNED: 41.3% / RENTED: 51.5%	OWNED: 60.8% / RENTED: 33.5%
INTERPOLATED MEDIAN PRICE / RENT OF PRIOR		PRICE: $184,600 / RENT: $680	PRICE: $252,000 / RENT: $934
MOST COMMON REASON FOR MOVING DOWNTOWN		ACTIVITIES PERSONAL SAFETY	PERSONAL SAFETY UNIQUE LIVING PLACE
HOUSING CHOICES DURING LAST MOVE		SOME	SOME
OWN / RENT CURRENT RESIDENCE (PERCENTS)		OWN: 60.9% / RENT: 39.1%	OWN: 71.0% / RENT: 29.0%
INTERPOLATED MEDIAN PRICE / RENT OF CURRENT		OWN: $191,000 / RENT: $772	PRICE: $253,000 / RENT: $1,075
INTERPOLATED YEARS AT CURRENT RESIDENCE		1.8 YRS.	2.7 YRS.
MOST COMMON NUMBER OF BEDROOMS		1	2
MOST COMMON NUMBER OF BATHROOMS		1	2
MOST IMPORTANT UNIT AMENITIES		WASHER/DRYER MACHINES SECURITY SYSTEM	SECURITY SYSTEM OPEN FLOOR PLAN
LEAST IMPORTANT UNIT AMENITIES		CEILING FANS FIREPLACES	CEILING FANS FIREPLACES
MOST IMPORTANT PROPERTY AMENITIES		SECURED BLDG. ENTRIES COVERED PARKING	SECURED BLDG. ENTRIES ASSIGNED PARKING
LEAST IMPORTANT PROPERTY AMENITIES		POOL / WHIRLPOOL OUTDOOR PLAY AREAS	POOL / WHIRLPOOL OUTDOOR PLAY AREAS
PARKING NEEDS (PERCENTS)		1 SPACE: 82.2% 2 SPACES: 16.2%	1 SPACE: 26.5% 2 SPACES: 66.5%
BEST THING ABOUT YOUR DOWNTOWN		EATING & DRINKING PLACES CLEANLINESS / APPEARANCE	EATING & DRINKING PLACES CLEANLINESS / APPEARANCE
WORST THING ABOUT YOUR DOWNTOWN		JOB MARKET PUBLIC SCHOOLS	JOB MARKET PUBLIC SCHOOLS

Source: VWB Research Survey Results

In comparison to DSA respondents who live with others, DSA respondents who live alone are more likely to be female, younger, make less money, are less educated, are more likely to be in school, are more likely to own their residence, moved downtown for increased personal safety or to enjoy more activities, live in smaller dwellings, pay less for housing, are more transient, and need fewer parking spaces.

DSA respondents who live with others are more likely to be male, older, higher educated, make more money, are more likely to own their residence, pay more for housing, moved downtown to live in a unique dwelling or for increased personal safety, live in their residence longer, live in larger dwellings, and need more parking spaces.

- In Question 19 of the Resident Survey, respondents gave the name of the specific property in which they were living. Since the survey went to residents of properties that were included in the field survey, property characteristics and performance can be cross-tabulated with survey responses. Selected property characteristics include: type (rental or condominium), size (number of units), height (number of floors), and development method (newly built or renovated). For size, properties are divided into small (2 to 19 units), medium (20 to 49 units), and large (50 units or more). For height, properties are divided into low-rise (one to three floors), mid-rise (four to six floors), and high-rise (seven or more floors). Development method is divided between newly built (built on cleared site since 1980) and renovated (refurbished building built before 1980). Rental property performance is divided between marginal (occupancy rate of below 95%) and good (occupancy rate of 95% or more). Condominium property performance is divided between marginal (absorption rate of below 0.8 sales per month) and good (absorption rate of 0.8 sales per month or higher). The following table shows the number and percentage of multi-unit housing properties and respondents by property characteristics and performance:

PROPERTY CHARACTERISTICS AND PERFORMANCE	PROPERTIES		RESPONDENTS	
	NUMBER	PERCENT	NUMBER	PERCENT
TYPE				
RENTAL	44	45.8%	90	25.9%
CONDOMINIUM	52	54.2%	258	74.1%
SIZE				
SMALL	39	40.6%	29	8.3%
MEDIUM	36	37.5%	106	30.5%
LARGE	21	21.9%	213	61.2%
HEIGHT				
LOW-RISE	48	50.0%	62	17.8%
MID-RISE	29	30.2%	184	52.9%
HIGH-RISE	19	19.8%	102	29.3%
DEVELOPMENT METHOD				
NEWLY BUILT	36	37.5%	139	39.9%
RENOVATED	60	62.5%	209	60.1%
PERFORMANCE				
MARGINAL RENTAL	17	17.7%	58	16.7%
GOOD RENTAL	27	28.1%	32	9.2%
MARGINAL CONDOMINIUM	27	28.1%	47	13.5%
GOOD CONDOMINIUM	25	26.1%	211	60.6%

Source: VWB Research Survey Results and Field Surveys

Significant findings from the cross-tabulation analysis follow:

- There are more female respondents living in marginally performing properties than males (63.8% in rentals; 59.6% in condominiums).

- Young adult (less than 35 years) respondents tend to live in large properties (50 units or more), while senior (55+ years) respondents favor small to medium properties (less than 50 units).

- Senior (55+ years) respondents tend to live in renovated properties, while young adult (less than 35 years) respondents favor newly built properties.

- There are more senior respondents living in marginally performing properties than young adults (51.7% in rentals / 62.5% in condominiums).

- Young adult respondents tend to live in mid-rise (four to six floors) and high-rise properties (seven floors or more), while seniors favor low-rise properties (less than four floors).

- In large properties (50 units or more), more respondents live alone than with others. The opposite is true in small and medium properties.

- In marginally performing rental properties, more respondents live alone than with others. In marginally performing condominium properties, more respondents live with others than alone. In good performing properties, the number of respondents living alone and with others is nearly the same.

- Lower-income respondents gravitate to larger properties, while higher-income respondents favor small and medium sized properties. In large properties, nearly two-thirds (63.2%) of respondents make less than $75,000 annually. This percentage drops almost in half in small and medium properties.

- Higher-income respondents prefer renovated properties, while lower-income respondents favor newly built properties. In newly built properties, 47.2% of respondents make less than $50,000 annually, while only 28.0% make $100,000 or more annually. These percentages are reversed for renovated properties (29.5% and 39.6%).

- Respondent income does not appear to be a factor in property performance. More lower-income respondents live in good performing rental properties than marginally performing rental properties, while income levels in condominium properties are about the same regardless of performance.

- Of respondents with children, most (93.8%) live in good performing condominium properties.

- The education level of respondents is higher in renovated properties than in newly built properties.

- The education level of respondents drops as properties get larger and taller. In small properties, 93.1% of respondents have a two-year college degree or more, 82.9% in medium properties, and 71.0% in large properties. In low-rise properties, 83.9% of respondents have a two-year college degree or more, 76.3% in mid-rise properties, and 63.1% in high-rise properties.

- The education level of respondents in good performing rental properties is higher than in marginally performing rental properties. However, the opposite is true for condominium properties.

- As properties increase in size and height, the percentage of student respondents residing within them increases.

- Of those student respondents who rent their residence, most (58.3%) are in good performing rental properties. Of the student respondents who own their residence, most (97.2%) are in good performing condominium properties.

- The highest percentage of respondents who are employed full-time is found in small (less than 20 units) properties for size and mid-rise (four to six floors) properties for height. In renovated properties, 71.4% of respondents are employed full-time, while only 31.2% of respondents in newly built properties are employed full-time.

- Of all respondents, 42.1% live in large (50 units or more), mid-rise (four to six floors) properties. By size and height, this property type has the most respondents. Two and half times more respondents live in large, mid-rise properties than the next most common property type (large, high-rise properties). The fewest respondents live in small, high-rise properties.

- Of all respondents, 45.5% live in renovated (refurbished building built prior to 1980), mid-rise (four to six floors) properties. By development method and height, this property type has the most respondents. Over twice as many respondents live in renovated, mid-rise properties than the next most common property type (newly built, high-rise). The fewest respondents live in renovated, low-rise properties.

- Of all respondents, 34.9% live in renovated (refurbished building built prior to 1980), large (50 units or more) properties. By development method and size, this property type has the most respondents. The next most common property type (newly built, high-rise) has 26.4% of respondents. The fewest respondents live in small, newly built properties.

- Of respondents who rent, most (83.7%) live in large (50 units or more) properties; most (63.0%) live in newly built (built on cleared site since 1980) properties; and most (51.1%) live in high-rise (seven floors or more) properties.

- Of respondents who own, most (53.5%) live in large properties (50 units or more); most (68.1%) live in renovated properties (refurbished building built prior to 1980); and most (55.8%) live in mid-rise (four to six floors) properties.

- Respondents were asked to cite the primary reason for their move downtown. Here are the most common reasons by property characteristic and performance:

PROPERTY PERFORMANCE	MOST COMMON REASONS FOR MOVE
MARGINAL RENTAL	CLOSE TO SCHOOL / WORK and FAVORABLE RENT
GOOD RENTAL	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
MARGINAL CONDOMINIUM	UNIQUE DWELLING and MORE ACTIVITIES
GOOD CONDOMINIUM	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
PROPERTY CHARACTERISTICS	
SIZE:	
SMALL (4 to 19 units)	CLOSE TO SCHOOL / WORK
MEDIUM (20 to 49 units)	MORE ACTIVITIES and UNIQUE DWELLING
LARGE (50+ units)	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
HEIGHT:	
LOW-RISE (1 to 3 floors)	UNIQUE DWELLING and MORE ACTIVITIES
MID-RISE (4 to 6 floors)	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
HIGH-RISE (7+ floors)	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
BUILDING TYPE:	
NEWLY BUILT	CLOSE TO SCHOOL / WORK and MORE ACTIVITIES
RENOVATED	CLOSE TO SCHOOL / WORK and UNIQUE DWELLING

- The following table provides residence and downtown satisfaction scores by property characteristics and performance:

PROPERTY CHARACTERISTICS & PERFORMANCE	RESIDENCE SATISFACTION		DOWNTOWN SATISFACTION	
	SCORE*	RANK**	SCORE*	RANK**
SIZE				
SMALL (4 to 19 units)	**2.97**	**3**	**2.96**	**3**
MEDIUM (20 to 49 units)	**3.39**	**1**	**3.46**	**1**
LARGE (50+ units)	3.11	2	3.18	2
HEIGHT				
LOW-RISE (1 to 3 floors)	**3.32**	**1**	**3.27**	**1**
MID-RISE (4 to 6 floors)	**3.19**	**3**	3.26	2
HIGH-RISE (7+ floors)	3.20	2	**3.23**	**3**
DEVELOPMENT METHOD				
NEWLY BUILT	**3.20**	**1**	**3.18**	**2**
RENOVATED	**3.17**	**2**	**3.30**	**1**
PERFORMANCE				
MARGINAL RENTAL	3.16	3	2.91	3
GOOD RENTAL	**3.02**	**4**	**2.90**	**4**
MARGINAL CONDOMINIUM	**3.40**	**1**	**3.44**	**1**
GOOD CONDOMINIUM	3.23	2	3.36	2

Source: VWB Research Survey Results and Field Investigation
*Scoring: Extremely = 4 / Very = 3 / Somewhat = 2 / Not At All =1
**Highest average score = top ranking = highest satisfaction level
**Lowest average score = bottom ranking = lowest satisfaction level

According to the above table, respondents living in medium-sized, low-rise, or newly built properties have the highest satisfaction level with their current residence, while respondents living in small-sized, mid-rise, or renovated properties have the lowest satisfaction level.

Respondents living in medium-sized, low-rise, or renovated properties have the highest satisfaction level with their downtown, while respondents living in small-sized, high-rise, or newly built properties have the lowest satisfaction level.

In the Performance section, respondents living in marginally performing condominium properties have the highest satisfaction level for both their residence and downtown. Respondents living in good performing rental properties have the lowest satisfaction level with both. There appears to be no correlation between satisfaction levels and property performance.

The single highest satisfaction score in the above table comes from respondents living in medium-sized properties regarding their downtown. The single lowest score comes from respondents living in good performing rental properties regarding their downtown.

D. MULTI-UNIT HOUSING DEMAND COMPARISONS

In many housing studies, traditional demand analyses produce "*estimated numbers of housing units that are assumed to be wanted by people within a geographic area; these housing unit estimates are then compared to available supplies of similar housing within the area to determine the size of any unmet need"*. These demand estimates are usually calculated for current and future timeframes. In short, a standard demand analysis tries to determine if additional housing units should be created, and if so, when, where, what, for whom, and how many. Often these analyses are too detailed to be reliable or too general to be useful. Finding the right degree of specificity for the study's purpose is the goal.

Since the Downtown Study Areas (DSAs) within this report vary greatly in terms of housing product, land area, demographics, redevelopment progress, and physical setting and since there are no specific project sites, the use of a traditional demand approach will not produce worthwhile results. Rather, a more creative and flexible method is needed for understanding multi-unit housing in the evolving and differing Michigan downtowns.

An effective methodology must recognize that the term "demand" in real estate is not "need", but rather "motivated desire". We are not studying the homeless, the evicted, new immigrants, released prisoners, or the destitute. We are studying people who have some degree of choice. Choice implies the voluntary selection of an item perceived to be the best or most desirable. In housing, a person must perceive a new living arrangement as being so superior or desirable to their existing one that they will uproot their household and expend significant funds to secure it. Moving a household is a major event, and it is not done without considerable contemplation. In addition to strong desire, people must operate within their financial means. It is human nature to desire things that we cannot afford.

If we accept the premise that demand is "motivated desire", then ***someone*** must desire ***something(s)*** sufficiently to consummate a real estate transaction and move. This statement forms the basis for the demand methodology in this study. We will analyze the DSAs aggregately, and define common patterns of *someones* and *somethings.* It is important to note that people desire that which they: (1) know, (2) like, (3) perceive as better, and/or (4) find intriguing.

The Someones

Who are the people that "desire" Michigan downtown living? In the big picture, it is anyone who finds downtown living sufficiently desirable to move there. If downtowns were perfect places to live, everyone would reside there.

However, the realities of Michigan's downtowns limit their desirability. They are not perfect places to live, even if some are more desirable than others. Their indigenous weaknesses and innate strengths combine to define the residents who will live there.

Trying to qualify the people who desire downtown living has merit. Knowing their characteristics can help housing providers and city planners craft the desired downtown attributes to attract them. However, trying to quantify the people who might move to a particular downtown and live in a particular housing product is extremely difficult, very unreliable, and largely misleading. Demand estimates that do not accurately reflect "motivated desire" quickly become unrealized numbers in a report.

Housing, cities, and economic conditions change constantly; human preferences and perceptions cannot be foretold precisely; and household growth, income trends, and tenure propensities are imperfect predictors of real estate "desire". For these reasons, the study of downtown residents should concentrate on profiling, and not estimating. Since desire is not limited by geography, the right combination of downtown attributes can attract potential residents from both near and far. With market areas defined by "desirability" and not geography, the number of potential users becomes enormous.

The Something's

What are the things that are "desired" in Michigan downtown living? In the big picture, it is anything that makes downtown living sufficiently desirable for people to move there. The two primary originators of desired downtown attributes are developers/property owners (housing product creators) and city governments (environmental facilitators). In a perfect world, real estate professionals build and operate desirable housing products within desirable environments facilitated and managed by city governments.

Are current downtown residents and neighborhoods good indicators of future downtown residents and neighborhoods? Yes, in that they provide the only real picture of who desires downtown living and what they find desirable there; and no, in that downtowns, their housing, and their residents change over time. Will today's residents desire tomorrow's downtowns? Will today's downtowns attract tomorrow's residents? No one really knows. In this study, the focus is on the empirical descriptors of the residents and neighborhoods currently comprising Michigan downtowns. Henceforth in this section, *someones* are "downtown housing users", and *somethings* are "desired qualities of living".

Downtown Housing Users

Within this study, two sources of data describe current Michigan downtown housing users. The first data set is the estimated 2007 demographic values (based on the 2000 Census) averaged for all 17 DSAs. The second data set is the resident survey values averaged for all respondents. The following table compares both data sources across 11 downtown housing user characteristics:

DOWNTOWN HOUSING USER CHARACTERISTIC	RESIDENT SURVEY VALUES*	2007 DEMOGRAPHIC VALUES**
GENDER		
MALE:	48.0%	52.7%
FEMALE:	52.0%	47.3%
AGE		
18 to 34 YEARS:	39.6%	43.2%
35 to 54 YEARS:	22.6%	31.9%
55+ YEARS:	37.8%	24.9%
LIVING ARRANGEMENT		
ALONE:	52.9%	54.0%
WITH SPOUSE:	31.7%	17.5%
WITH OTHERS (NOT SPOUSE):	15.4%	28.5%
EDUCATION LEVEL		
HIGH SCHOOL GRAD OR LESS:	7.5%	54.2%
SOME COLLEGE/ASSOC. DEGREE:	23.0%	16.7%
BACHELORS DEGREE OR MORE:	69.5%	29.1%
AVERAGE HOUSEHOLD SIZE:	1.6 Persons	2.0 Persons
MEDIAN HOUSEHOLD INCOME:	$77,500	$23,151
CHILDLESS HOUSEHOLDS:	95.2%	78.1%
TENURE		
OWNERS:	65.6%	24.5%
RENTERS:	34.4%	75.5%
OWNER RESIDENCY LENGTH:	2.7 Years	7 Years
STUDENT HOUSEHOLDS:	18.0%	20.1%
UNEMPLOYMENT RATE:	3.0%	7.3%***

*Source: VWB Research; DSA Resident Survey
**Source: 2000 Census; Claritas, Inc. (average for all DSAs)
***Source: DOL; Bureau of Labor Statistics (average for all DSA cities over the last 10 years)

The above table indicates that the two sets of data produce differing results. In comparison to the demographic values, the resident survey shows that downtown multi-unit housing respondents: (1) are more female in numbers, (2) are older and less middle-aged, (3) live with spouses more than with others (non-spouses), (4) are more educated, (5) live in smaller households, (6) have higher household incomes, (7) are more often childless, (8) own rather than rent, (9) have lived in their residence less time, if owners, and (10) enjoy a lower unemployment rate. The most striking variances occur in education, income, tenure, unemployment, and residency length.

But these differences are not the result of conflicting descriptions of the same population. Rather, the differences lie in who is being described and how accurately. The 2007 demographic values (appearing in the right-hand column of the above table) are estimated and represent all DSA housing users, regardless of their living arrangement. These values are generated by trending 2000 Census data to the year 2007 using a series of assumptions. The accuracy of these values is a function of how closely the assumptions match actual local conditions occurring between 2000 and 2007. As we know, Michigan downtowns and their housing markets have gone through significant transformations since 2000. Whether demographers accurately anticipated these changes in their projections is hard to measure, but accuracy limitations are innate to the art of estimating. The advantage of this data, however, is its comprehensiveness, both in terms of count and characteristics.

The resident survey values (appearing in the center column of the above table) are real-time, but represent a small portion of DSA housing users who live in newer, unsubsidized, multi-unit residential properties. Nothing is more accurate than a direct response from a DSA multi-unit housing user in the year 2007. Limitations of the resident survey stem from its unscientific sampling method and small response size. Whereas Claritas, Inc. (our demographic supplier) estimated that 20,337 people lived within the 17 DSAs of this study in 2007, the resident survey produced 378 respondents from 12 DSAs. In the 2000 Census, two-thirds of DSA residents lived in multi-unit buildings (two or more units). If we apply this percentage to the estimated 2007 population for all DSAs and divide by the average household size (two persons), approximately 6,750 multi-unit housing user households emerge. The 378 survey respondent households represent 5.6% of these total estimated DSA multi-unit households.

Thus, the two sets of data differ because the resident survey respondents come from a small subset of multi-unit housing users that are part of the larger estimated DSA population. So, which data better describes current downtown multi-unit housing users? The answer is both. The estimated 2007 demographic values provide a better description of the entire DSA population, whereas the resident survey responses provide a better description of the study's specific DSA multi-unit housing user population living in newer, unsubsidized properties. Both data sets contribute to a clearer understanding of DSA multi-unit housing users. By comparing and analyzing these sets of data jointly, the following descriptors emerge:

- Gender: Ostensibly, there is a 50-50 split between males and females in both sets of data. Although this ratio varies slightly between data sets and more significantly among individual DSAs, generally both genders impact the downtown housing scene equally. One gender does not drive downtown housing markets at the exclusion of the other.

- Age: Both data sets indicate that most DSA housing users fall in the young adults (18 to 34 years) age group. The data differs with respect to middle-aged and senior users. We believe that the demographic data, which shows a larger middle-aged group than senior group, is influenced by single-family neighborhoods captured within the DSA boundaries. It is our opinion that the resident survey, which shows a larger senior group than middle-aged group, better describes DSA multi-unit housing users. It should be noted that in the resident survey owner median age is 50.5 years, whereas renter median age is 32.5 years. Since more owners responded to the survey than renters, the age data could be skewed. From this analysis, we believe the primary age groups driving DSA multi-unit housing markets are *young adults* (18 to 34 years) and *seniors* (55+ years).

- Living Arrangement: Living alone is the most common lifestyle arrangement as reported by both data sets (over 50% of DSA housing users). The data sets differ with respect to users who live with "spouses" versus with "others" (not spouses). Since survey respondents are primarily owners, and these owners are 2.5 times more likely to be living with spouses, we believe the resident survey is skewed toward "spouses". However, we also believe that the demographic values do not reflect the newer, unsubsidized, multi-unit housing properties (many of which attract married couples) that have come on-line in DSAs since 2000. From this analysis, we believe that housing users who *live alone* primarily drive DSA multi-unit housing markets. However, DSA housing users who live with "spouses" and "others" constitute meaningful, equally-sized subgroups in the downtown housing marketplace.

- Education Level: The data sets vary greatly for this characteristic. The resident survey reports that nearly 70% of multi-unit housing respondents have at least a bachelor's degree, while a little over 7% only went to high school. The demographic values show that 29.1% of all DSA housing users have at least a bachelor's degree, while 54.2% stopped at high school. This disparity clearly indicates that survey respondents represent a highly educated subgroup within the general DSA population. It must be noted that many survey respondents lived in DSAs with colleges and universities, which could have influenced results. However, even with sampling limitations, it is clear that the education level of DSA multi-unit housing users is significantly higher than the overall DSA population. This indicates a sophisticated user subgroup within downtown housing markets.

- Household Size: Survey respondents appear to live in small households averaging just over one-and-a-half persons. Since the survey data shows that over 50% of these respondents live alone, the other half must live with one other person. The demographic data shows that DSA households in general average two persons. Since the demographic data also shows that over 50% of these users live alone, the other half must live with at least two other people. These three-person households indicate the presence of more children and roommates. From this analysis, we believe that DSA multi-unit housing users are comprised primarily of households with singles, childless couples, life partners, and two roommates. The general DSA population appears to include more households with multiple-roommates, couples with children, and single parents with children.

- Household Income: The data sets vary greatly for this characteristic. The resident survey indicates that multi-unit housing respondents make 3.5 times more gross annual income than households in the general DSA population ($77,500 versus $23,151). This would indicate that multi-unit housing respondents are a higher-income subset of the lower-income DSA general population. Although the resident survey had a high percentage of wealthy respondents, it is clear that DSA multi-unit housing users enjoy incomes that are significantly higher than the medians for each DSA.

- Childless Households: Over 95% of resident survey respondents live in childless households. The demographic values support a high childless rate as well (78.1%) for the overall DSA population. Clearly, children (less than 18 years of age) are not DSA multi-unit housing users. The clear lack of children in survey respondent households contributes to their smaller household size.

- Tenure: The data sets vary greatly for this characteristic. Resident survey respondents are nearly two-thirds owners and one-third renters. The demographic values for all DSA residents indicate that 75.5% are renters and 24.5% are owners. This disparity is due to the survey sample and the introduction of new downtown housing properties since the 2000 Census. First, the survey sample was comprised of 65% owners and 35% renters who were living in newer, unsubsidized, multi-unit downtown housing properties. These percentages do not reflect the true tenure split for all DSA multi-unit housing users (our fieldwork identified a 52%-48% owner-to-renter ratio for newer, unsubsidized housing properties). Since survey responses were received at the same ratio as the sample, owner respondents outnumbered renter. Moreover, many new "for sale" properties have come on-line since the 2000 Census. Thus, estimated demographic data most likely missed this trend, and underrepresented "owners" in its overall DSA values. In reconciling the data variance, it is our opinion that approximately one-half of DSA multi-unit housing users own and one-half rent in 2007.

- Owner Residency Length: Survey respondents who own their residence report an average residency length at the time of the survey of 2.7 years, whereas the demographic values indicate 7.0 years for all DSA housing owners. This difference can be explained by: (1) older single-family neighborhoods caught within DSA boundaries, (2) estimated demographic data inaccurately reflecting new housing built since 2000, and (3) survey respondents living in newly completed housing properties. For these reasons, DSA multi-unit housing users are newcomers to the downtown scene, having lived there on average for only a few years.

- Employment: The data sets vary greatly for this characteristic. Of the survey respondents who want to work, their reported unemployment rate is 2.5 times lower than the aggregate citywide unemployment rate for all DSAs. It appears that DSA multi-unit housing users who want to work are more gainfully employed than DSA citywide populations.

From the above analysis, current DSA housing users living in newer, multi-unit, unsubsidized properties are typically:

1. **Males and females equally**
2. **Young adults or seniors** (18 to 34 or 55+ years)
3. **Living alone or with one other person** (spouse/roommate/partner)
4. **Well-educated**
5. **Earning more than the area median income**
6. **Childless**
7. **Renters and owners equally**
8. **Newcomers to downtown living** (under 3 years on average)
9. **Employed outside the home in the Service industry or retired**

To crosscheck this DSA housing user profile, we re-examine Claritas, Inc. Prizm NE Lifestage Class percentages aggregated for all DSA populations:

- **Younger Years: 43.6%** (singles / couples under 45 years and childless)

- Family Life: 17.1% (middle-aged adults with children living at home)

- **Mature Years: 39.3%** (singles / couples over 45 years and childless)

The high percentages for *Younger Year* and *Mature Year* classes further substantiate the age and childlessness characteristics of the DSA multi-unit housing user profile. This profile appears to accurately represent the *someones* who are currently using and "desiring" newer, multi-unit, unsubsidized residential properties in Michigan's downtowns.

Desired Qualities of Living

From observations in this study, "desired qualities of living" in downtowns fall into two major categories: (1) the **housing** itself, and (2) the **environment** in which it is placed. The housing is defined by on-site attributes controlled and manipulated by developers/property owners, while the environment is defined by off-site attributes either naturally-occurring or managed by city governments (the environment used here includes both physical and economic factors).

Study results indicate that DSA multi-unit housing users judge the desirability of the following 30 **on-site housing attributes** when considering a move to downtown:

Design & Construction

1. **Project size** (# of units / # of buildings / site area / density)
2. **Unit size** (living area per unit type)
3. **Unit type** (# of bedrooms / # of bathrooms / # of floors / floor plan)
4. **Building height** (# of stories)
5. **Elevator service** (buildings with two or more floors)
6. **Barrier-free access** (building / units)
7. **Structure type** (adaptive reuse / new construction / rehabilitation)
8. **Design uniqueness** (building / units / grounds)
9. **Construction quality** (materials / methods / warranties)
10. **Modernity** (current building industry materials-features-designs)
11. **Heating & cooling** (unit control / common areas conditioned)
12. **Energy use** (utility mix & metering / efficiency / equipment)
13. **Unit features** (appliances / floor & window coverings / private outdoor areas / ceiling heights / finishes / laundry set-up / internet-cable / etc.)
14. **Common area features** (pools / laundry facilities / resident storage / tennis courts / fitness centers / saunas-whirlpools / outdoor recreation areas / party rooms-clubhouses / etc.)

Parking

15. **Resident parking**:
    - Number of spaces provided
    - Assigned or unassigned
    - Covered or enclosed
    - Distance from dwelling units to spaces (on-site or off-site)
16. **Visitor parking**:
    - Number of spaces provided
    - Designated or undesignated
    - Distance from spaces to building (on-site or off-site)

Security

17. **Unit security** (fire / forced-entry / emergency response)
18. **Building security** (controlled access / surveillance)
19. **Parking area security** (controlled access / surveillance)

Services

20. **Developer & homeowner association performance** (condos)
21. **Management performance** (on-site / off-site)
22. **Maintenance** (building interior and exterior / grounds / unit interior)
23. **Personal** (valet / concierge / housekeeping)
24. **Commercial spaces** (retail / office / work spaces)

Other

25. **Location & proximity** (work / school / neighborhood amenities)
26. **Tenure** (rental or ownership)
27. **Cost** (prices / rents / fees)
28. **Views** (unit / common areas)
29. **Privacy** (from fellow residents)
30. **Noise & odors** (between units & within building)

Study results indicate that DSA multi-unit housing users judge the desirability of the following 20 **off-site environmental attributes** when considering a move to downtown:

Physical Environment

1. **Safety** (personal & property crime / police presence / homelessness)
2. **Retail services** (number / variety / most needed / hours of operation)
3. **Eating & drinking establishments** (cuisines & prices / lounging)
4. **Public events** (festivals / shows / races / concerts / walks / parades)
5. **Public outdoor areas** (parks / plazas / hike & bikeways / waterfronts)
6. **Movement** (with a car / without a car / traffic / parking / public transit)
7. **Sociability** (ease of meeting people / friendliness / approachability)
8. **Sensory appeal** (cleanliness / noise / odor / water-air quality / climate)
9. **Geographic features** (hills / woods / rivers / lakes / streams / ponds)
10. **Recreational offerings** (indoor / outdoor)
11. **Historic context** (restored districts & buildings / legends / celebrities)
12. **Entertainment venues** (stadiums / arenas / clubs / auditoria / movies)
13. **Cultural venues** (theaters / museums / galleries / art & music schools)
14. **User-friendly streetscapes** (signage / wide sidewalks / street life / after 5 pm businesses / occupied storefronts / greenscape / traffic crossings)
15. **Major employer or institute of higher education** (activity generator / city advocate / people provider)

Economic Environment

16. **Financial incentives** (type / duration / source)
17. **Taxes** (rates / types)
18. **Job opportunities** (prominent employers in or near downtown)
19. **Cost of living** (other than housing)
20. **Housing market** (resale ease / appreciation / choices / rent stability)

According to our "motivated desire" demand model, anyone who meets the "downtown housing user" profile and locates a DSA with sufficient "desired qualities of living" should become (or remain) its resident. The controlling factor for downtown living is not the user, but rather the DSA. The user profile is sufficiently broad to generate significant numbers of desirous people. However, the condition of DSA "qualities of living" is limiting this potential desire from being satisfied. If the above "desired qualities of living" can be sufficiently addressed or improved in DSAs, new residents should arrive and existing residents should remain in Michigan downtowns.

To generate and analyze the number of 2007 households in each DSA city that meets the study's "downtown housing user profile", we performed the following calculations:

1. Separated the total number of 2007 households in each DSA city into those living within the DSA ("current" users) and those living within the remainder of the DSA city ("potential" users).

2. Selected the four (out of 11) Claritas, Inc. Prizm NE Lifestage Groups that most closely matched the study's "downtown housing user profile" (*Midlife Successes-Y1*, *Young Achievers-Y2*, *Affluent Empty Nesters-M1*, and *Conservative Classics-M2*), and applied their percentages to the household numbers in Item 1 above (major Columns 2 and 3 below).

3. Added the "current" and "potential" downtown housing user households together to yield the number of "available" downtown housing user households for each DSA city (major Column 4 below).

4. Divided the "available" downtown housing user households by the total households in each DSA city. The resulting percentages show the share of all households in each DSA that meets the "downtown housing user profile" (major Column 5 below).

5. Divided the "current" downtown housing user households by the "available" downtown housing user households in each DSA city. The resulting percentages show the current (2007) capture rates (share of all available DHU households currently living downtown) for each DSA (major Column 6 below).

The results of these calculations appear in the following table:

DOWNTOWN STUDY AREA CITY	CURRENT DOWNTOWN HOUSING USER HOUSEHOLDS* IN DSA		POTENTIAL DOWNTOWN HOUSING USER HOUSEHOLDS* IN REST OF DSA CITY		AVAILABLE DOWNTOWN HOUSING USER HOUSEHOLDS* IN DSA CITY		AVAILABLE DHU HOUSEHOLDS* AS A SHARE OF ALL HOUSEHOLDS IN DSA CITY		CURRENT DHU HOUSEHOLDS* AS A SHARE OF AVAILABLE DHU HOUSEHOLDS* IN DSA CITY	
	NUMBER	RANK	NUMBER	RANK	NUMBER	RANK	PERCENT	RANK	PERCENT	RANK
ANN ARBOR	471	3	**26,956**	**1**	**27,427**	**1**	**59.5%**	**1**	1.7%	8
BATTLE CREEK	**3**	**17**	6,153	7	6,156	7	28.8%	9	**0.05%**	**17**
BAY CITY	37	T10	3,109	14	3,146	15	21.4%	13	1.2%	9
EAST LANSING	37	T10	4,258	12	4,295	12	30.0%	7	0.9%	10
FERNDALE	498	2	2,937	15	3,435	14	35.1%	6	**14.5%**	**1**
FLINT	30	12	8,388	5	8,418	5	18.2%	16	0.35%	14
GRAND RAPIDS	**565**	**1**	21,040	2	21,605	2	29.8%	8	2.6%	3
HOLLAND	98	6	4,731	9	4,829	9	40.8%	2	2.0%	5
JACKSON	14	15	3,489	13	3,503	13	26.1%	10	0.4%	T12
KALAMAZOO	186	5	9,873	4	10,059	4	35.6%	T4	1.9%	6
LANSING	308	4	16,814	3	17,122	3	35.6%	T4	1.8%	7
MIDLAND	27	13	6,790	6	6,817	6	39.5%	3	0.4%	T12
MUSKEGON	62	8	**2,241**	**17**	**2,303**	**17**	**15.9%**	**17**	2.7%	2
PONTIAC	41	9	5,509	8	5,550	8	22.5%	12	0.7%	11
PORT HURON	65	7	2,899	16	2,964	16	23.3%	11	2.2%	4
SAGINAW-NORTH	15	14	4,435	T10	4,450	T10	20.9%	15	0.3%	15
SAGINAW-SOUTH	6	16	4,435	T10	4,441	T10	21.0%	14	0.15%	16
DSA AVERAGE	145		7,886		8,031		29.7%		2.0%	
DSA MEDIAN	41		4,731		4,829		28.8%		1.2%	

Source: 2000 Census; Claritas, Inc. (estimates for 2007)
*Households that meet the Downtown Housing User (DHU) Profile (4 Prizm NE Lifestage Groups)
Red value = highest / Blue value = lowest
Red ranking = top / Blue ranking = bottom
T = Tied

Noteworthy observations and trends from this table include the following:

- On average, it is estimated that **145 downtown housing user households** (**DHUHs** or those households meeting the study's profile) currently live within a DSA. This ranges from a high of 565 DHUHs in Grand Rapids to a low of three in Battle Creek.

- On average, it is estimated that 7,886 potential DHUHs currently live within the remainder of a DSA city. This ranges from a high of 26,956 in Ann Arbor to a low of 2,241 in Muskegon.

- On average, it is estimated that 8,031 available DHUHs currently live within a DSA city. This ranges from a high of 27,427 in Ann Arbor to a low of 2,303 in Muskegon.

- On average, nearly 30.0% of all households in DSA cities meet the DHUH profile. This ranges from a high of 59.5% in Ann Arbor to a low of 15.9% in Muskegon. These values are surprisingly high, given the fact that **they do not reflect any potential DHUHs from outside of DSA cities, counties, or the state of Michigan.** According to our resident survey, 52.4% of respondents had prior residences outside their current city. If this share of *current* DHUHs is any indication of additional *potential* DHUHs, then the total number of *available* DHUHs for each DSA could be much larger.

- On average, DSA cities capture only 2.0% of the available DHUHs within their city limits. This ranges from a high of 14.5% in Ferndale to a low of 0.05% in Battle Creek. It should be noted that Ferndale's unusually high capture rate (next highest capture rate is 2.7% in Muskegon) is skewed due to the large size of the DSA compared to the small size of the city. As the size of the DSA approaches the size of the city, the DSA will eventually capture all of its DHUHs. If the Ferndale anomaly is excluded from the analysis, every DSA city is capturing less than 1.5% of its available downtown housing user households.

The data in the above table should be used carefully and prudently. It should not be used to generate specific housing demand estimates for DSAs. Rather, it should be used as indicators of general market size and city/developer performance. It should be remembered that the above values do not include any potential DHUHs residing outside of DSA cities. This uncalculated submarket could substantially add to the number of *available* DHUHs in each DSA. This above data generally shows the following:

- A very small percentage of available DHUHs currently live within DSAs (less than 1.5% on average, excluding the Ferndale anomaly).

- There are many potential DHUHs living within DSA cities, but not downtown (over 29% of all non-DSA households are potential DHUHs; 8,031 on average).

- All DSA cities have sizable DHUH markets, however, developers and cities cannot seem to attract these households downtown. Eight of the 17 DSAs in this study have captured less than 1.0% of the available DHUHs in their downtowns. The lowest DSA capture/attraction rates are in Saginaw, Pontiac, Midland, Jackson, Flint, and Battle Creek. In these DSAs, few or no desirable housing properties currently exist.

- Available DHUH markets vary greatly in size among DSA cities. Clearly, Ann Arbor will have a much better chance of filling a new, multi-unit, downtown housing property than will Muskegon, given its larger number of available DHUHs (27,427 versus 2,303).

In the next table, we compare the total number of surveyed housing units within a DSA to its total number of *current* DHUHs (within the DSA) and *available* DHUHs (within the entire city). This data shows how well the housing supply is satisfying "motivated desire".

DOWNTOWN STUDY AREA CITY	UNITS IN ALL SURVEYED HOUSING PROPERTIES IN DSA		CURRENT DOWNTOWN HOUSING USER HOUSEHOLDS* IN DSA		AVAILABLE DOWNTOWN HOUSING USER HOUSEHOLDS* IN DSA CITY		CURRENT DHUHs* PER SURVEYED HOUSING UNIT IN DSA		AVAILABLE DHUHs* PER SURVEYED HOUSING UNIT IN DSA	
	NUMBER	RANK	NUMBER	RANK	NUMBER	RANK	NUMBER	RANK	NUMBER	RANK
ANN ARBOR	774	2	471	3	27,427	1	0.61	9	35	12
BATTLE CREEK	15	14	3	17	6,156	7	0.20	15	410	4
BAY CITY	148	7	37	T10	3,146	15	0.25	14	21	15
EAST LANSING	130	9	37	T10	4,295	12	0.29	13	33	13
FERNDALE	43	12	498	2	3,435	14	11.58	3	89	7
FLINT	188	6	30	12	8,418	5	0.16	17	45	9
GRAND RAPIDS	1,294	1	565	1	21,605	2	0.44	12	17	16
HOLLAND	71	10	98	6	4,829	9	1.38	5	68	8
JACKSON	26	13	14	15	3,503	13	0.54	10	135	5
KALAMAZOO	234	5	186	5	10,059	4	0.80	T6	43	11
LANSING	387	3	308	4	17,122	3	0.80	T6	44	10
MIDLAND	0 / 1**	T15	27	13	6,817	6	27	1	6,817	1
MUSKEGON	360	4	62	8	2,303	17	0.17	16	6	17
PONTIAC	52	11	41	9	5,550	8	0.79	8	107	6
PORT HURON	132	8	65	7	2,964	16	0.49	11	23	14
SAGINAW-NORTH	0 / 1 **	T15	15	14	4,450	T10	15	2	4,450	2
SAGINAW-SOUTH	0 / 1 **	T15	6	16	4,441	T10	6	4	4,441	3
AVERAGE FOR ALL DSAs (17)	227		145		8,031		3.91		987	
AVERAGE FOR DSAs WITH UNITS (14)	275		173		8,630		1.32		77	
DSA MEDIAN	130		41		4,829		0.61		45	

Sources: 2000 Census; Claritas, Inc. (estimates for 2007) & VWB Research (field research)
*Households that meet the Downtown Housing User (DHU) Profile (4 Prizm NE Lifestage Groups)
**1 is used in place of 0 when calculating the last two columns of data, so values will result
Red value = highest / Blue value = lowest
Red ranking = top / Blue ranking = bottom
T = Tied

In 12 DSAs, the number of surveyed housing units exceeds the number of estimated downtown housing user households (DHUHs). In three DSAs (Midland, Saginaw-North, and Saginaw-South), no surveyed housing units are present and the estimated numbers of DHUHs are very small (27, 15, and 6). In two DSAs (Ferndale and Holland), the number of estimated DHUHs exceeds the number of surveyed housing units, indicating some degree of unfilled "desire" from within the DSA. According to our resident survey, only 18.3% of respondents had prior residences in the same downtown.

If entire cities rather than just DSAs are considered, results become more promising. In all 17 DSA cities, the estimated number of DHUHs far exceeds the number of surveyed housing units. On average, there are nearly 1,000 "available" DHUHs for every surveyed housing unit. According to our resident survey, 29.3% of respondents had prior residences in the same city, but not downtown. In the same survey, 52.4% of respondents had prior residences outside their current city.

From this analysis, it is clear that DSA cities cannot rely upon the DHUH's currently within their DSAs to make their downtowns once again healthy and vibrant places to live. Rather, DSA cities must convince the large group of potential DHUHs (7,886 on average) currently living outside of DSAs (but within the same city) to relocate downtown. Under our "motivated desire" model, this can only be achieved if DSA governments, in conjunction with area developers, address and/or improve the all-important "desired qualities of living". This includes both the **housing** and **environmental** components.

Previously in this section, we identified 50 "desired qualities of living" that potential housing users consider before moving downtown. Of the qualities, 30 pertain to the housing itself, and 20 relate to the environment in which housing is placed. Not every quality is judged by every DHUH. However, when the right combination of qualities is judged sufficiently desirable, a lease or purchase agreement is signed.

Within the scope of this study, our demographics, field research, and surveys produced sufficient empirical data to generate rudimentary "desirability" ratings for the two main groups of "qualities" (environment and housing) by DSA. It is beyond the scope of this study to operationally define and secure the data for all 50 of the identified "qualities". However, we believe reliable DSA "desirability scores" can be devised that help indicate how successful individual locales (cities and developers) have been in creating desirable downtowns. Remember, our demand model hypothesizes that the number of downtown housing users is directly proportional to downtown desirability.

To generate the DSA desirability score for the *housing component* of the "qualities of living", we focus on two factors: (1) the number of surveyed housing units (adjusted for city size by dividing the total number of households in a DSA city by the number of surveyed housing units), and (2) the share of "good performing" housing units (95%+ occupancy rate for rentals and 0.8+ units/month absorption rate for condominiums). A large number of surveyed DSA housing units indicate development activity, city-developer partnerships, and perceived market desire. A high percentage of good performing housing units indicate satisfied user desire, proper product planning, and good property management.

The following table provides the resulting values and rankings by DSA:

DOWNTOWN STUDY AREA	UNITS IN ALL SURVEYED HOUSING PROPERTIES IN DSA		UNITS IN GOOD PERFORMING SURVEYED HOUSING PROPERTIES IN DSA		GOOD PERFORMING HOUSING UNITS AS A SHARE OF ALL SURVEYED HOUSING UNITS IN DSA		CITYWIDE HOUSEHOLDS PER SURVEYED HOUSING UNIT IN DSA **	
	NUMBER	RANK	NUMBER	RANK	PERCENT	RANK	NUMBER	RANK
ANN ARBOR	774	2	766	2	**99.0%**	**1**	59	3
BATTLE CREEK	15	14	**0**	**T12**	0.0%	T12	1,067	14
BAY CITY	148	7	81	7	54.7%	7	100	5
EAST LANSING	130	9	123	5	94.6%	2	112	6
FERNDALE	43	12	6	11	14.0%	10	227	10
FLINT	188	6	91	6	48.4%	8	231	11
GRAND RAPIDS	**1,294**	**1**	**949**	**1**	73.3%	5	56	2
HOLLAND	71	10	**0**	**T12**	0.0%	T12	167	9
JACKSON	26	13	**0**	**T12**	0.0%	T12	512	13
KALAMAZOO	234	5	180	4	76.9%	4	124	8
LANSING	387	3	318	3	82.2%	3	123	7
MIDLAND	**0 / 1 ***	**T15**	-	**T15**	-	**T15**	17,360	15
MUSKEGON	360	4	26	9	7.2%	11	**40**	**1**
PONTIAC	52	11	8	10	15.4%	9	463	12
PORT HURON	132	8	80	8	60.6%	6	96	4
SAGINAW-NORTH	**0 / 1 ***	**T15**	-	**T15**	-	**T15**	**21,313**	**T16**
SAGINAW-SOUTH	**0 / 1 ***	**T15**	-	**T15**	-	**T15**	**21,313**	**T16**
AVERAGE FOR ALL DSAs (17)	227		155		36.8%		3,727	
AVERAGE FOR DSAs WITH UNITS (14)	276		188		44.7%		241	
DSA MEDIAN	130		26		15.4%		167	

Sources: 2000 Census; Claritas, Inc. (estimates for 2007) & VWB Research (field research)
Red value = highest / Blue value = lowest
Red ranking = top / Blue ranking = bottom
T = Tied
*1 is used in place of 0 when calculating the last two columns of data, so values will result
**A low value = a high ranking / a high value = a low ranking

The significant data in the above table appears in the two, major, right-hand columns. The ranking numbers in these two columns are added together for each DSA to form the "Quantifiable Housing Qualities of Living" score. These scores appear in the next table with the DSA desirability score for the *environmental component* of the "qualities of living". By adding the ordinal rankings of the following seven environmental qualities, we generate a "Quantifiable Environmental Qualities of Living" score for each DSA:

- Safety: indices for personal and property crime (source-Applied Geographic Solutions; modeled from FBI Uniform Crime Report)

- Retail Services: retail businesses per square mile (source-Claritas, Inc.)

- Public Events: number of public events held annually (source-individual city governments)

- Movement: average commute time, vehicles per household, and percent commuting without a car (source-Claritas, Inc.)

- Streetscapes: resident population per square mile and daytime population per square mile (source-Claritas, Inc.)

- Major Employer: largest employer; includes institutes of higher education (source-Info USA Business Database; Claritas, Inc.)

- Job Offerings: jobs per square mile and citywide unemployment rate (sources-Bureau of Labor Statistics and Claritas, Inc.)

The scores in the right major column of the following table are the sum of the *environmental* and *housing* scores for each DSA, and form the overall DSA "Quantifiable Desired Qualities of Living" score. These overall scores are ranked with the lowest value representing the most desired DSA, and the highest score reflecting the least desired DSA.

DOWNTOWN STUDY AREA	QUANTIFIABLE ENVIRONMENTAL QUALITIES OF LIVING * (7 OF 20)		QUANTIFIABLE HOUSING QUALITIES OF LIVING * (COLUMNS 4 & 5 ABOVE)		QUANTIFIABLE DESIRED QUALITIES OF LIVING * (TOTAL OF TWO SCORES)	
	SCORE	RANK	SCORE	RANK	SCORE	RANK
ANN ARBOR	12	1	4	1	16	1
BATTLE CREEK	66	10	26	14	92	10
BAY CITY	51	5	12	T6	63	5
EAST LANSING	29	2	8	3	37	T2
FERNDALE	78	13	20	10	98	12
FLINT	81	14	19	9	100	13
GRAND RAPIDS	30	3	7	2	37	T2
HOLLAND	62	T8	21	T11	83	8
JACKSON	72	12	25	13	97	11
KALAMAZOO	37	4	12	T6	49	4
LANSING	54	6	10	T4	64	6
MIDLAND	55	7	30	15	85	9
MUSKEGON	91	17	12	T6	103	15
PONTIAC	90	16	21	T11	111	16
PORT HURON	62	T8	10	T4	72	7
SAGINAW-NORTH	82	15	31	T16	113	17
SAGINAW-SOUTH	71	11	31	T16	102	14

Sources: 2000 Census; Claritas, Inc. (estimates for 2007) & VWB Research (field research)
Red value = highest / Blue value = lowest
Red ranking = top / Blue ranking = bottom
T = Tied
*A low value = a high ranking / a high value = a low ranking

It is important to note that our "desirability scores" are based on the subjective selection and interpretation of data gathered during this study. These scores have been generated using three sources of data: demographics, field research, and survey instruments. However, as mentioned earlier, the environmental component of the scores reflects only seven of its 20 qualities, and the housing component reflects only two composite factors (number of surveyed units adjusted for city size and property performance). Although it is our belief that these scores are fundamentally sound, they should be considered ordinal indicators and not precise measurements. We are simply trying to quantify the concept of "desirability" by using selected empirical factors. We acknowledge that these scores are subjective, and open to differing opinions.

From the previous table, the 17 DSAs in this study can be grouped into the following three, desirability categories:

CATEGORY 1	CATEGORY 2	CATEGORY 3
ANN ARBOR	PORT HURON	FLINT
EAST LANSING	HOLLAND	SAGINAW-SOUTH
GRAND RAPIDS	MIDLAND	MUSKEGON
KALAMAZOO	BATTLE CREEK	PONTIAC
BAY CITY	JACKSON	SAGINAW-NORTH
LANSING	FERNDALE	

Category 1 DSAs are desirable, Category 2 DSAs are becoming desirable, and Category 3 DSAs are not yet desirable to downtown housing users.

The purpose of this table is not to render an opinion on whether a city is good or bad, but rather to show where on a continuum of desirability a particular DSA city currently falls. All cities in this study have the same opportunity to become desirable, or more desirable. It is our opinion that certain DSAs are farther along the path of "desirability" than others due to their improving downtown environments and evolving developer/property owner partnerships. These three categories are not measures of livability, but rather indicators of: (1) where "motivated desire" (demand) is going, and (2) how effectively cities and developers are attracting and capturing it downtown. The above table is a 2007 desirability snapshot of DSA downtowns and their housing.

Throughout this demand section, we have used a methodology that advocates "*someone must desire something(s)*". To bring this concept to conclusion, we have provided the following table that shows by DSA: (1) available downtown housing user households as a share of all city households (portion of city residents with a good potential for living downtown), and (2) desired qualities of living scores (desirability of a downtown and its housing). The right column combines the ordinal ranking numbers of the two prior columns, and presents a final "market strength" (demand) ranking for each DSA. The table follows:

DOWNTOWN STUDY AREA	AVAILABLE DOWNTOWN HOUSING USER HOUSEHOLDS* AS A SHARE OF ALL CITY HOUSEHOLDS (SOMEONES)		DESIRED QUALITIES OF LIVING ** (SOMETHINGS)		MARKET STRENGTH ** (DESIRE)	
	PERCENT	RANK	SCORE	RANK	SCORE	RANK
ANN ARBOR	59.5%	1	4	1	2	1
BATTLE CREEK	28.8%	9	26	14	23	T11
BAY CITY	21.4%	13	12	T6	19	10
EAST LANSING	30.0%	7	8	3	10	T3
FERNDALE	35.1%	6	20	10	16	8
FLINT	18.2%	16	19	9	25	15
GRAND RAPIDS	29.8%	8	7	2	10	T3
HOLLAND	40.8%	2	21	T11	13	6
JACKSON	26.1%	10	25	13	23	T11
KALAMAZOO	35.6%	T4	12	T6	10	T3
LANSING	35.6%	T4	10	T4	8	2
MIDLAND	39.5%	3	30	15	18	9
MUSKEGON	15.9%	17	12	T6	23	T11
PONTIAC	22.5%	12	21	T11	23	T11
PORT HURON	23.3%	11	10	T4	15	7
SAGINAW-NORTH	20.9%	15	31	T16	31	17
SAGINAW-SOUTH	21.0%	14	31	T16	30	16

Sources: 2000 Census; Claritas, Inc. (estimates for 2007) & VWB Research
Red value = highest / Blue value = lowest
Red ranking = top / Blue ranking = bottom
T = Tied
*All households in a DSA city that meet the Downtown Housing User Profile (1 of 4 Prizm NE Lifestage Groups)
**A low value = a high ranking / a high value = a low ranking

From the above table, the 17 DSAs in this study can be grouped into the following three, market strength categories:

STRONGER MARKET	AVERAGE MARKET	WEAKER MARKET
ANN ARBOR	HOLLAND	BATTLE CREEK
LANSING	PORT HURON	JACKSON
EAST LANISNG	FERNDALE	MUSKEGON
GRAND RAPIDS	MIDLAND	PONTIAC
KALAMAZOO	BAY CITY	FLINT
		SAGINAW-SOUTH
		SAGINAW-NORTH

Using our "motivated desire" demand model, the above table shows where DSAs currently fall along the continuum of downtown housing market strength; in short, where *someones* are most likely seeking their desired *somethings*.